Volume

33

Expedient User Manual – Workflow

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INTRODUCTION

The Expedient Import Job Tracking and Workflow Module allows you to:

Job Tracking (Stage One)

1. Allocate a sequence of steps or events that are required to be completed on an import job from creation to completion. These are the job milestones.

   These milestones are defined by you to suit your internal operational process and procedures, and can be defined by *job profile*.

   Job Profile is described by the following characteristics:

   - Department
   - Job Type (Freight Forwarding Only, Customs Only, Freight Forwarding and Customs)
   - Mode Type (Sea, Air, etc)
   - Container Class (FCL, LCL, etc)

   Milestones can be selected from a comprehensive list of system or manual event types. These event types already exist. The system events are recorded automatically when a user performs an action through the menus or when a background process executes such as an interface. Setting up milestones is done by nominating which of these events are considered imperative to the best practice completion of an import job.

2. Track a status against each Import Job that is updated automatically based on the last milestone that was completed.

3. Define an exception condition against each milestone. This allows you to define when a milestone will be considered to be in exception if it has not been completed within a particular time frame from another date (eg ETA, Job Registration, Sea Cargo Lodgement).

4. Assign each milestone to a category. This category is a classification of the "type of work" of the milestone (eg. Forwarding, Accounting, Customs, Transport).

5. Various Job Status Enquiry screens allow for a high level real-time view of the number of jobs at each status or in exception with drill-down capacity describing the precise exception condition that has been breached with direct access to the Import Job Registration screen.

6. Various Job Status and Exception reports.

So far the above describes the job tracking functionality. It is recommended that the above functionality be used initially to refine the job milestones and exceptions. The next stage is Workflow.

WorkFlow (Stage Two)

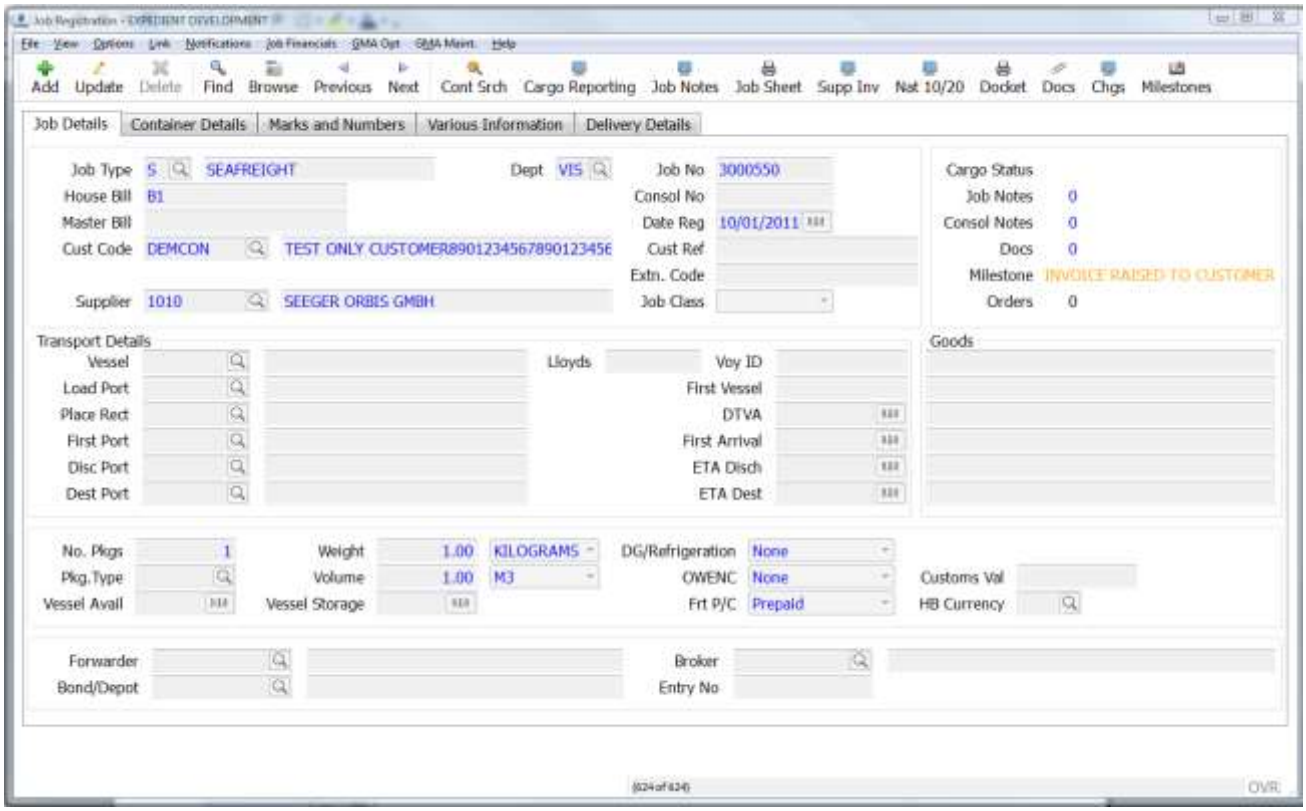
This stage of implementing workflow extends the job tracking functionality so that jobs can appear in a user's workflow screen in ETA order showing them the task that they are required to complete. This involves:

1. Allocating milestone categories to personnel roles and using this to create workflow teams.

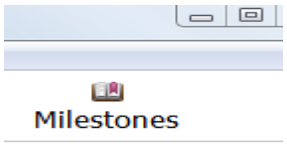
Let us begin by taking a guided tour of the Expedient Software Job Tracking and Work Flow module.

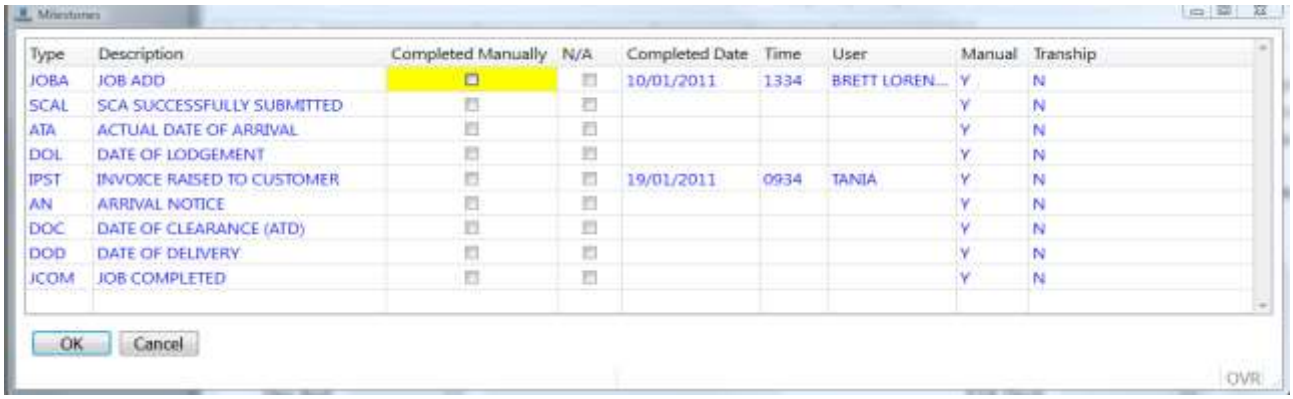
Import Job Registration

When Job Tracking is enabled each job will be allocated a set of milestones. In the Job Registration Screen the first thing that you will notice is that each job will have a status displayed in the top right hand corner (Milestone). This is the status of the job which is the last milestone that was completed (by sequence).



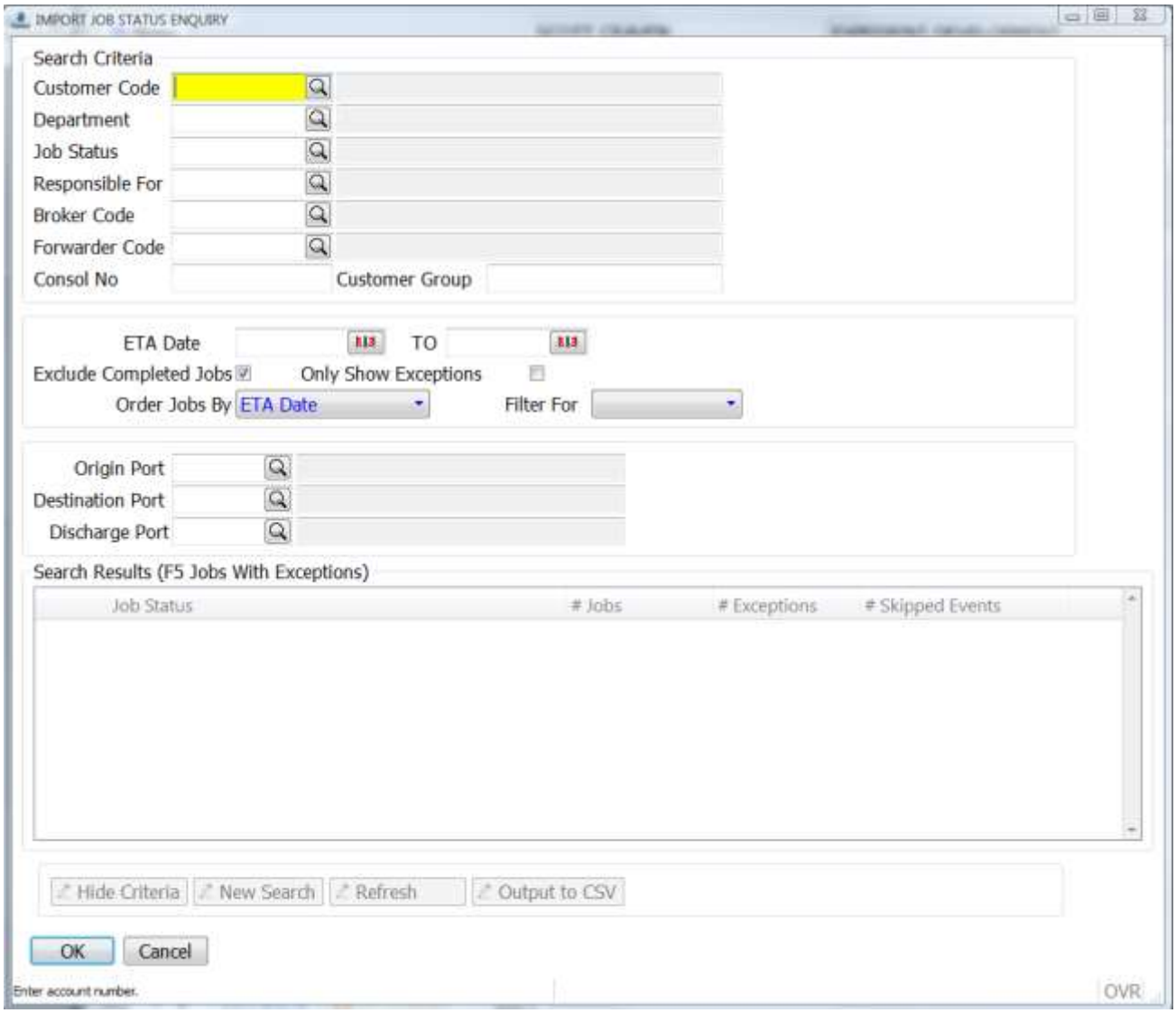
In the job registration screen these can be accessed by the Milestones toolbar option.





Field Name	Description	Validation	Default
Type	This is the event code.	Display Only	None
Description	This is the event description	Display Only	None
Completed Manually	This check-box allows the user to complete a milestone manually. If this is the last milestone that is completed in the milestone sequence for this job then this event type is used to update the job status. A milestone that is checked as “Completed Manually” can be unchecked by the user. This will cause the status of the job to revert to the last completed milestone.	Optional	Unchecked
N/A	This check-box allows the user to mark a milestone as not applicable. Unlike a “Completed Manually” milestone, a milestone that is marked as N/A will not be used to update the job status.	Optional	Unchecked
Completed Date	This field is only modifiable for manual milestones. When a completed date is entered for a manual milestone, an actual event is also created. This can be viewed in Options, View/Add Events.	Optional	Blank
Completed Time	This field is only modifiable for manual milestones.	Optional	Blank
User	This field displays the name of the user that completed the milestone.	Display Only	
Manual	Will be “Y” for manual milestones and “N” for system milestones.	Display Only	
Transhp	Will be “Y” for transhipment milestones and “N” for non-transhipment milestones.	Display Only	

Import Job Status Enquiry



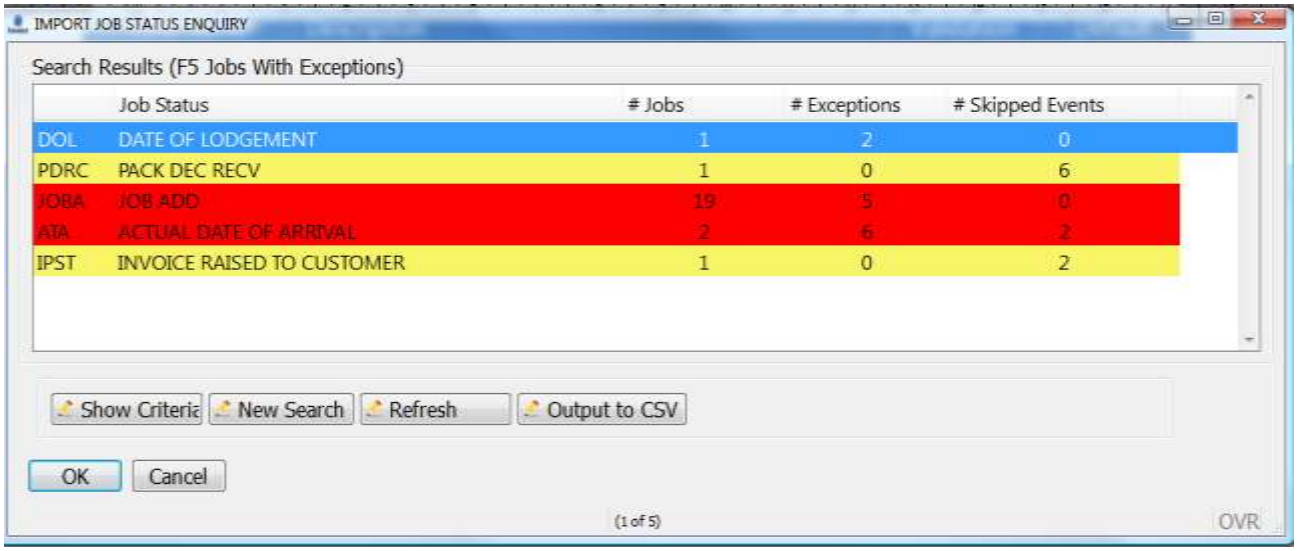
This screen allows you to search for import jobs using fields such as job status and milestone category.

Field Name	Description	Validation	Default
Customer Code	Enter or select a valid customer code or a wildcard.	Optional	Blank
Department	Enter or select a valid department.	Optional	Blank
Job Status	Enter or select a valid job status (event code) or a wildcard.	Optional	Blank

Field Name	Description	Validation	Default
Responsible For	Enter or select a valid user from the Zoom list. Using this field to search will look for jobs for customers that this user is entered as the "responsible person" in the customer master file Debtors tab.	Optional	Blank
Broker Code	Enter or select a valid customer code (broker) or a wildcard.	Optional	Blank
Forwarder Code	Enter or select a valid customer code (forwarder) or a wildcard.	Optional	Blank
Consol No	Enter a valid consol number or wildcard.	Optional	Blank
Customer Group	Enter a valid customer group or wildcard. Using this field to search will look for jobs for customers where this customer group matches the "Customer Group" in the customer master file Configuration tab.	Optional	Blank
ETA Date Range	Enter a valid date range	Optional	Blank
Exclude Completed Jobs	When this is checked, then completed jobs are excluded from the search results.	Optional	Checked
Some Helpful Hints	*What is a completed job?* A job is completed when all the milestones are completed or marked as non-applicable. A completed job has a status of "JOB COMPLETE" (JCOM).		
Only Show Exceptions	When this is checked, then only jobs for which there is an outstanding exception condition or for which there are skipped events are shown in the search results.	Optional	Unchecked
Some Helpful Hints	*What is an exception?* Exception conditions are set up in the job milestones set-up screen. A job is in exception if a milestone has not been completed within a specified time frame.		
Some Helpful Hints	*What is a skipped event?* When you set up your milestones, you must enter the sequence in which you expect them to be completed for any given job. Although there is nothing precluding the milestones from being completed out of sequence, it may be useful for you to know this as it may indicate that steps are constantly being overlooked.		

Field Name	Description	Validation	Default
Order Jobs By	Select the order of the search results from the drop down list: ETA DATE or Job Number	Mandatory	ETA Date
Filter For	Select a milestone category from the drop down list. This option is best used with "Only Show Exceptions" checked. When a "filter for" category is selected, only jobs with milestones of this category that are in exception are shown in the results.	Optional	Blank
Some Helpful Hints	*What is the purpose of the "Filter For"?*		
Origin Port	Enter or select a valid origin port or wildcard.	Optional	Blank
Destination Port	Enter or select a valid destination port or wildcard.	Optional	Blank
Discharge Port	Enter or select a valid discharge port or wildcard.	Optional	Blank
Hide Criteria Button & Show Criteria Button	After the search results have been displayed, use this button to hide the search criteria part of the screen, showing more of the results. When the search criteria are hidden, the button is renamed to "Show Criteria" and has the opposite effect.		
New Search Button	This button allows you enter new search criteria.		
Refresh Button	This button will rerun the current search.		
Output to CSV Button	This button will create a CSV file with the current results.		
F5 Button In Search Results	When used in the search results screen, this button will pop-up a new screen with the jobs relating to the selected line in the results but will only show those jobs that have an exception or that have a skipped step.		

Results



Fields

Field	Description
Job Status	Job Status
#Jobs	A count of all the jobs currently at the displayed job status.
#Exceptions	A count of the total number of exceptions for the displayed jobs. Each job may have zero or more exceptions.
#Skipped Events	A count of the total number of skipped events for the displayed jobs. Each job may have zero or more skipped events.

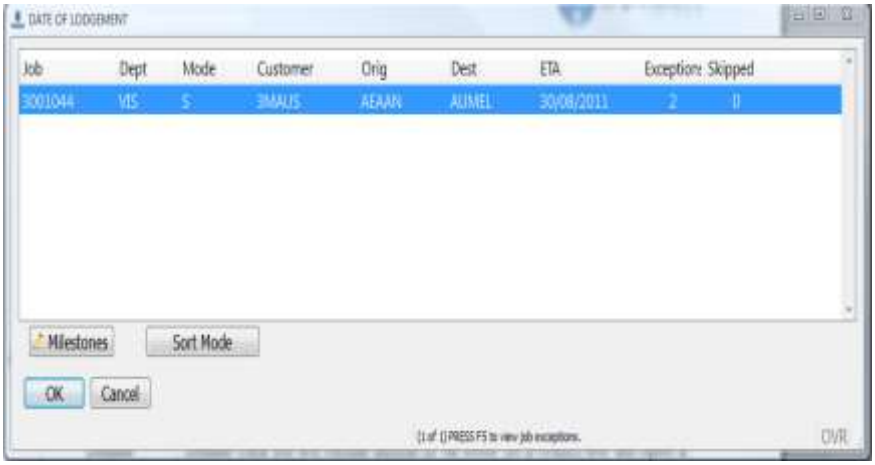
Colours

Colour	Description
No Colour	These jobs have no exceptions and no skipped events
Yellow	These jobs have skipped events but no exceptions.
Red	These jobs have exceptions. They may also have skipped events.

Actions

Action	Description

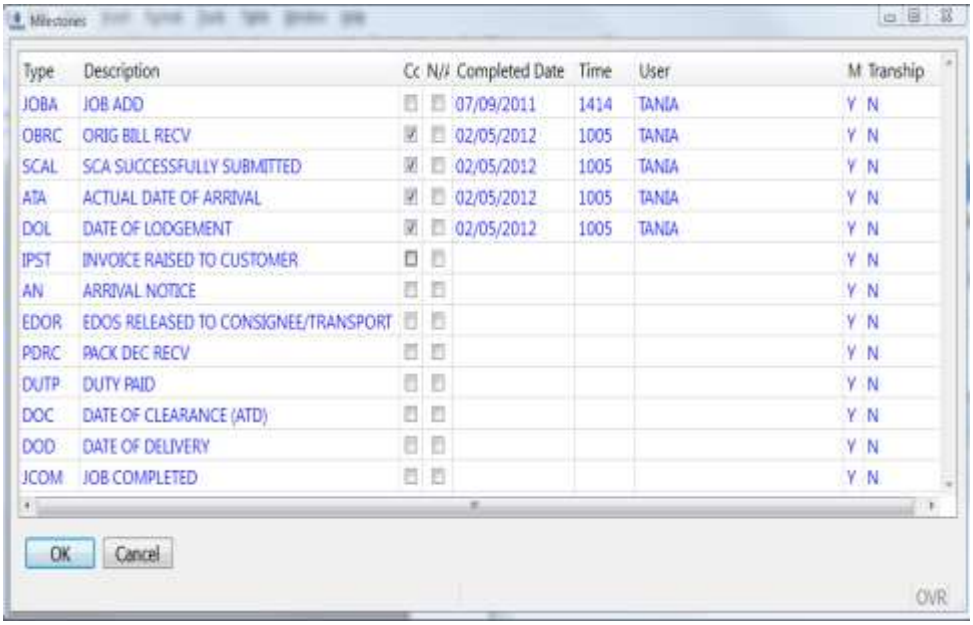
Action	Description
Double Click/Enter	Double Click the left mouse button or hit enter on a results line will open a new window with details of those jobs.

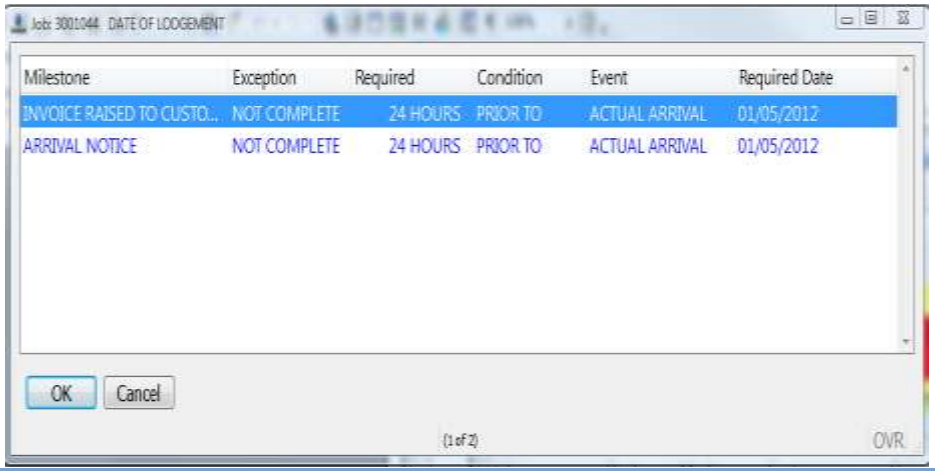


Double Click/Enter – Opens the import job registration screen for the selected job.

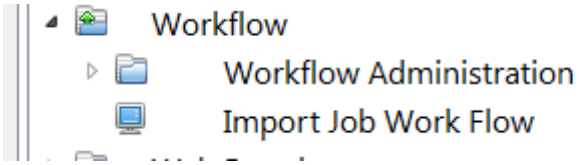
Sort Mode button – This button will put the screen into sort mode.
This will allow you to sort the results by any column by clicking on it and allow you to output the results to a CSV file.
When in Sort Mode, the "Browse Mode" button will take you back to the previous screen.

Milestones Button – This button will display the milestones for the highlighted job.

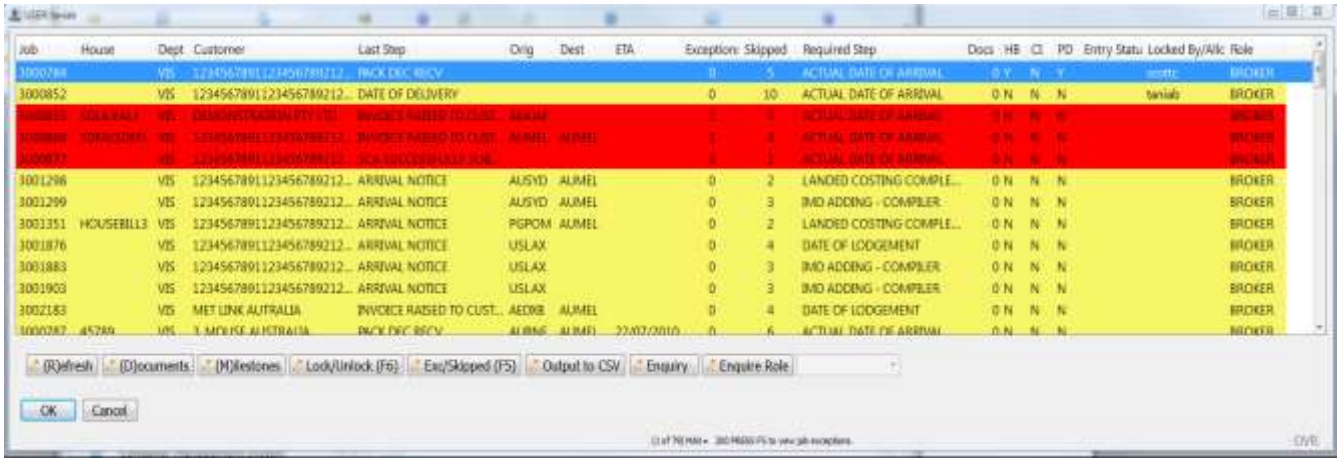

Milestones
Type
Description
Cc
N/A
Completed Date
Time
User
M
Transhipment
JOBA JOB ADD 07/09/2011 1414 TANIA Y N
OBRC ORIG BILL RECV 02/05/2012 1005 TANIA Y N
SCAL SCA SUCCESSFULLY SUBMITTED 02/05/2012 1005 TANIA Y N
ATA ACTUAL DATE OF ARRIVAL 02/05/2012 1005 TANIA Y N
DOL DATE OF LODGEMENT 02/05/2012 1005 TANIA Y N
IPST INVOICE RAISED TO CUSTOMER Y N
AN ARRIVAL NOTICE Y N
EDOR EDOS RELEASED TO CONSIGNEE/TRANSPORT Y N
PDRC PACK DEC RECV Y N
DUTP DUTY PAID Y N
DOC DATE OF CLEARANCE (ATD) Y N
DOD DATE OF DELIVERY Y N
JCOM JOB COMPLETED Y N
OK
Cancel
OVR

Action	Description
F5	Hitting the F5 button on any job with exceptions or skipped events will show you the exact exception conditions that exist. 

Workflow Screen



This screen displays the user's workflow. Jobs are displayed in ascending ETA date order by default. However, the screen can be sorted by any column by clicking on the column heading.



Field Name	Description	Validation	Default
Job	The job number	Display Only	N/A
House	The house bill	Display Only	N/A
Dept	The department	Display Only	N/A
Customer	The customer name	Display Only	N/A
Last Step	The last milestone that was completed on the job. This is synonymous with the job status.	Display Only	N/A
Orig	The port or origin.	Display Only	N/A
Dest	The destination port.	Display Only	N/A
ETA	The Estimated Date of Arrival of the job	Display Only	N/A

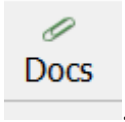
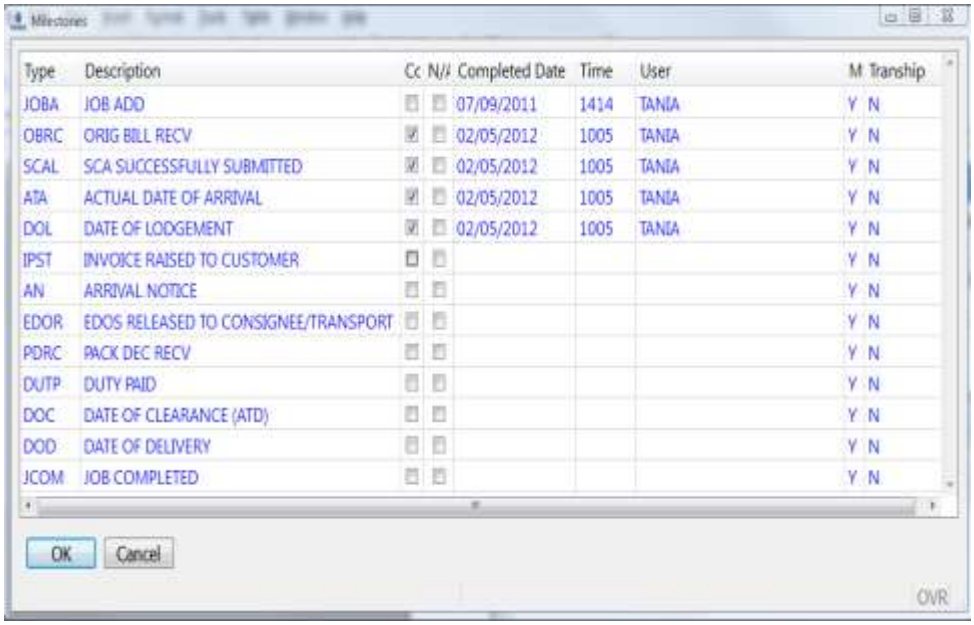
Field Name	Description	Validation	Default
Exceptions	The number of exceptions for this job. If this is greater than zero, the line is shown in red.	Display Only	N/A
Skipped	The number of skipped events for this job. If this is greater than zero, the line is shown in yellow.	Display Only	N/A
Required Step	This is the step that is required to be performed by this user on this job.	Display Only	N/A
Docs	The number of documents that have been attached to this job.	Display Only	N/A
HB	This Y/N flag indicates if the "original Bill" has been marked as received in the "Documents Screen" for the job.	Display Only	N/A
Some Helpful Hints	*How do I get to the Documents Screen?* From Job Registration, Options, Documents Screen		
HB	This Y/N flag indicates if the "Original Bill" has been marked as received in the "Documents Screen" for the job.	Display Only	N/A
CI	This Y/N flag indicates if the "Supplier Inv" has been marked as received in the "Documents Screen" for the job.	Display Only	N/A
PD	This Y/N flag indicates if the "Packing Dec." has been marked as received in the "Documents Screen" for the job.	Display Only	N/A
Entry Status	This is the status of the entry as displayed in the Nature 10/20 screen.	Display Only	N/A

Field Name	Description	Validation	Default
Locked By/Allocated To	The user name of the user that is currently working on this job. The user's name will be displayed against a job when either: 1. He/she has gone to the job registration screen from the workflow screen. 2. The Lock/Unlock (F6) button is pressed on a job that is currently not allocated or being worked on by someone else. It serves as a way for staff who may be working on the same set of jobs to know if someone is already working on one of them. The user's name will be cleared from the job when either: 1. The required step is completed. 2. The Lock/Unlock (F6) button is pressed releasing the job back into the workflow pool. If a user has allocated a job to a particular user, that users name will appear next to the job as well.	Display Only	N/A
Role	This is the role of the user in relation to this job. A user can have one or more roles in different work groups.	Display Only	N/A

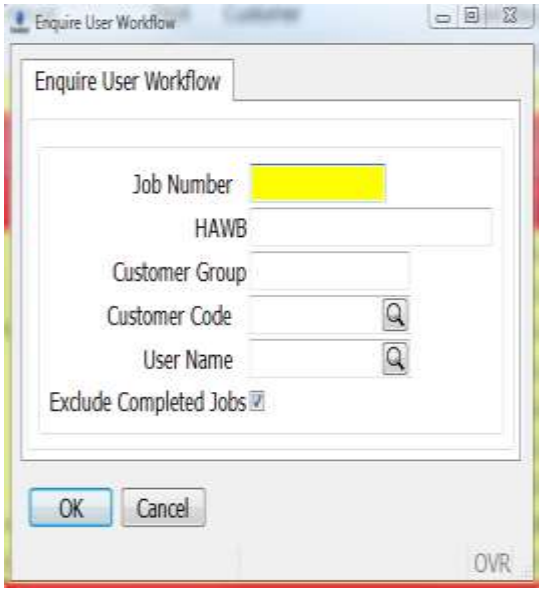
Colours

Colour	Description
No Colour	These jobs have no exceptions and no skipped events
Yellow	These jobs have skipped events but no exceptions.
Red	These jobs have exceptions. They may also have skipped events.

Button	Description
Refresh	This will refresh the workflow screen, by re-running the search for the users jobs.

Button	Description
Documents	This will show the same documents screen as displayed in the Job Registration screen Docs button  . This allows the user to view and attach documents to the job.
Milestones	*Milestones Button* – This button will display the milestones for the highlighted job.  Milestones Type Description Cc N/I Completed Date Time User M Tranship JOBA JOB ADD 07/09/2011 1414 TANIA Y N OBRC ORIG BILL RECV 02/05/2012 1005 TANIA Y N SCAL SCA SUCCESSFULLY SUBMITTED 02/05/2012 1005 TANIA Y N ATA ACTUAL DATE OF ARRIVAL 02/05/2012 1005 TANIA Y N DOL DATE OF LODGEMENT 02/05/2012 1005 TANIA Y N IPST INVOICE RAISED TO CUSTOMER Y N AN ARRIVAL NOTICE Y N EDOR EDOS RELEASED TO CONSIGNEE/TRANSPORT Y N PDRC PACK DEC RECV Y N DUTP DUTY PAID Y N DOC DATE OF CLEARANCE (ATD) Y N DOD DATE OF DELIVERY Y N JCOM JOB COMPLETED Y N OK Cancel OVR
Lock/Unlock(F6)	The user uses this button to indicate that they are currently working on this job. Their user name is displayed next to the job on the screen. The button is a toggle key to lock/unlock the job.
Exc/Skipped (F5)	When used in the search results screen, this button will pop-up a new screen with the jobs relating to the selected line in the results but will only show those jobs that have an exception or that have a skipped step.
Output to CSV	Output the full results of this user's workflow screen to a CSV file.

Button	Description
Enquiry	This button will display a Workflow Enquiry Screen.



Job Number – Enter a job number or wild card.

HAWB – Enter a house bill or wild card.

Customer Group – Enter a customer group or wild card. This will show all jobs for customers with this customer group in the Customer Master File Configuration tab.

Customer Code – Enter or select a customer code or wild card.

User Name – Enter or select a user name or wild card. This will show jobs that are currently locked by or allocated to the entered user.

Exclude Completed Jobs – When checked will exclude completed jobs from search results.

The search results will display in a new workflow screen. NOTE: Not all the actions are available in the search results screen.

Button	Description
Enquire Role	When this button is selected, the user can select a user role from the drop-down list. This will refresh the workflow screen with the workflow results for the selected role within the current user's work groups. That is, if the current user's role is "Broker" for department "VCA", and enquires on the role of "Compiler" then all jobs which require something to be done by a compiler in department "VCA" will be displayed. To return to their own workflow the user hits the "Escape" button or select "My Workflow" from the drop-down list.
Allocate	Management Role Only A manager can use this option to allocate a job to a specific user and role.
Show Allocated	Management Role Only A manager can use this option to display any user/role combinations that have been allocated to the job.
Show Work	Management Role Only A manager can use this option to display how much time was spent working on the job. This is strictly just start and end time between a job being locked by a user and the job being released by the user.

Import Job Milestones

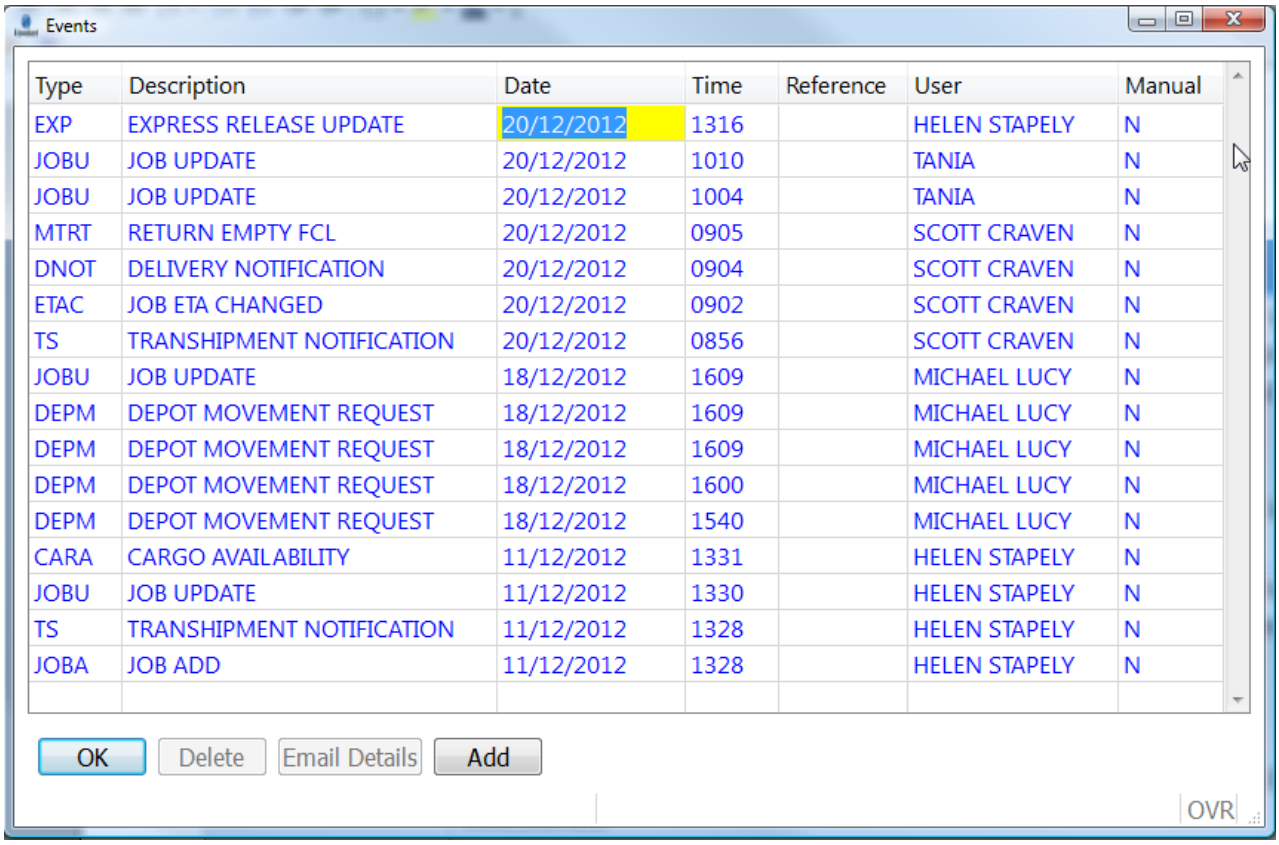
The first step in implementing workflow is to define the sequence of steps or events that are required to be completed on an import job from creation to completion. These are the job milestones.

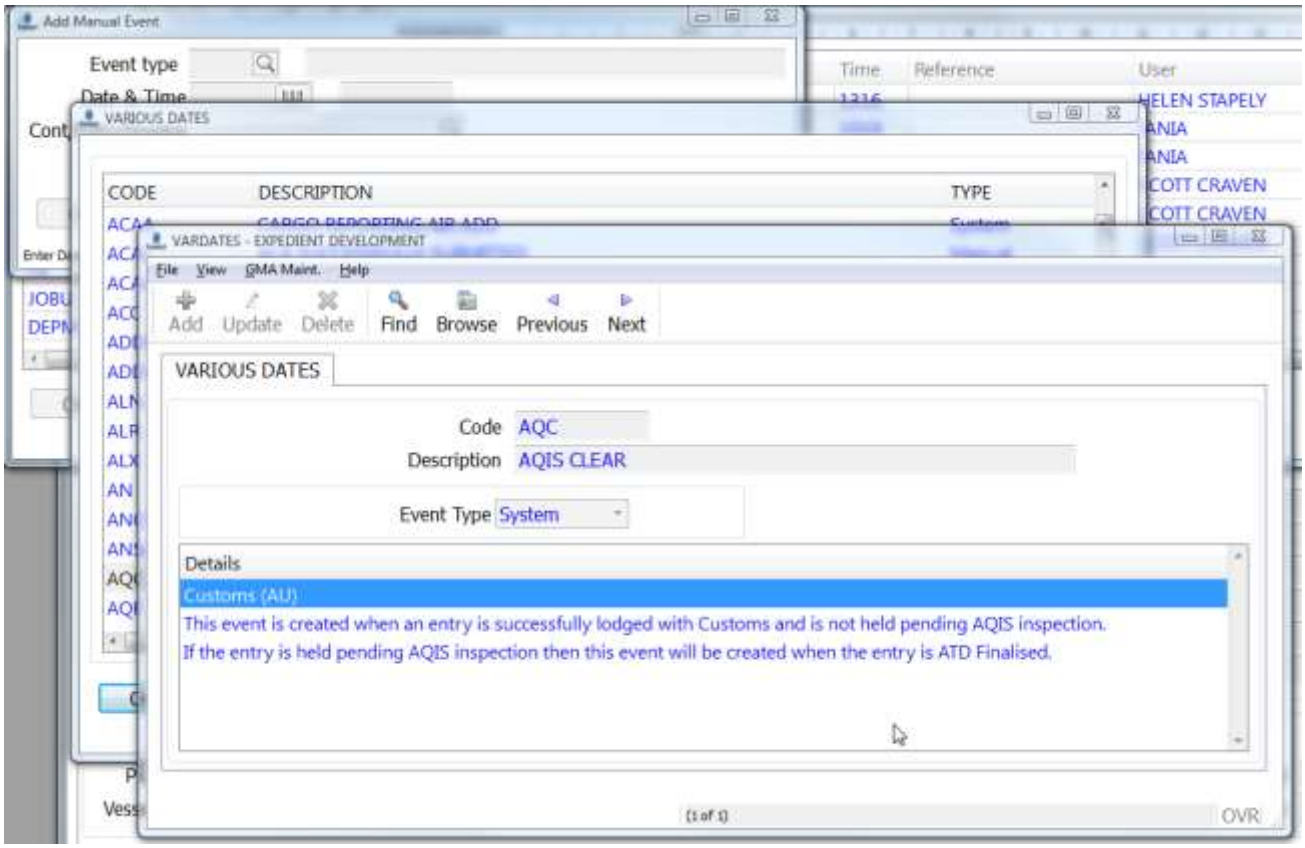
These milestones are defined by you to suit your internal operational process and procedures, and can be defined by *job profile*.

Job Profile is described by the following characteristics:

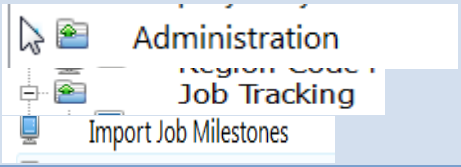
- Department
- Job Type (Freight Forwarding Only, Customs Only, Freight Forwarding and Customs)
- Mode Type (Sea, Air, etc)
- Container Class (FCL, LCL, etc)

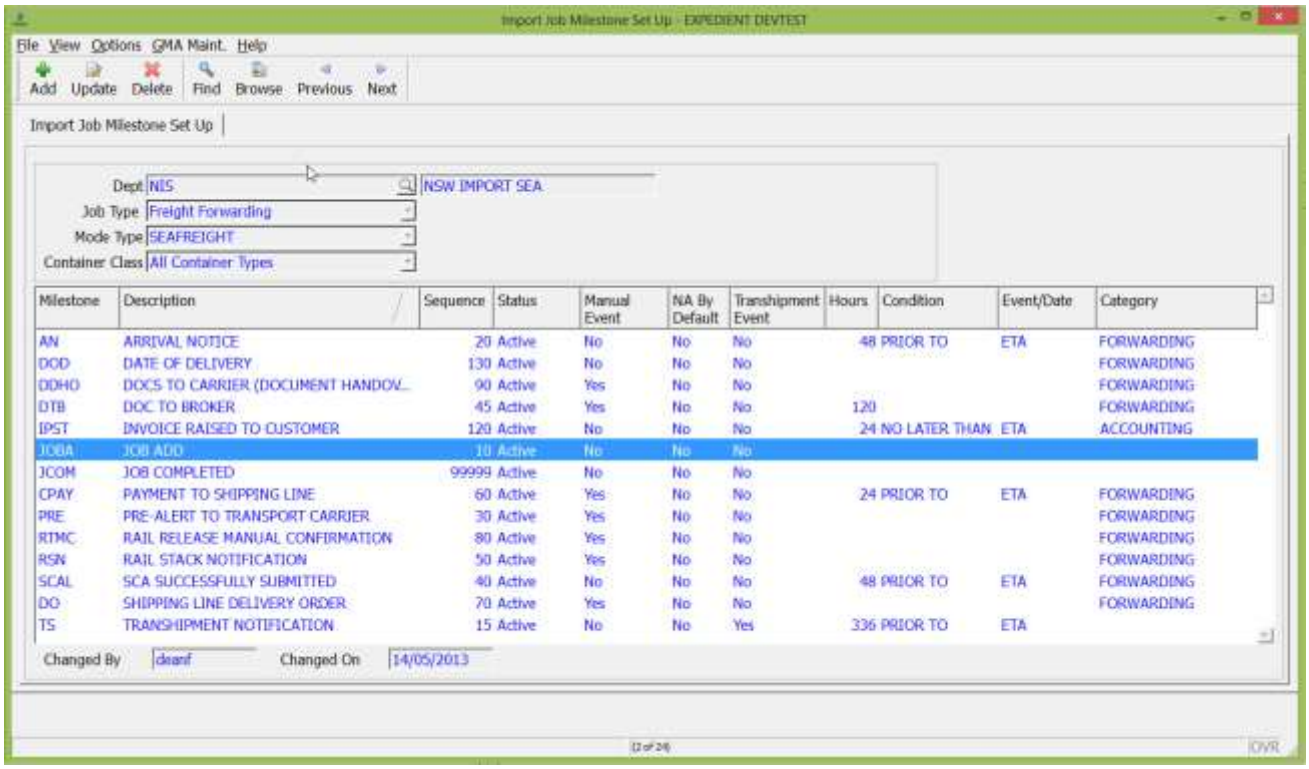
Step	Description
One	This is the time to sit down with your staff and understand your own internal process for each job type. It is a great time to standardise your processes. It is a good idea to document what are the tasks performed by staff for import jobs taking note of : • The differences between job profiles as defined above. • The conditions that are used to determine when a job is in exception.
Two	It may be helpful to look at an example of each type of job that is commonly processed by your staff and to examine the events that get generated by the system for the various processes. To do this use: Job Registration, Options – View/Add Events The codes used in the "Type" field are the Event Codes that can be used as milestones. To see a full description of each event code, how and when it is created by the system, select "Add" on the "View/Add Events" screen, Zoom on the "Event Type" field and use the "Details" button to display full information on each event.


Events
Type Description Date Time Reference User Manual
EXP EXPRESS RELEASE UPDATE 20/12/2012 1316 HELEN STAPELY N
JOBU JOB UPDATE 20/12/2012 1010 TANIA N
JOBU JOB UPDATE 20/12/2012 1004 TANIA N
MTRT RETURN EMPTY FCL 20/12/2012 0905 SCOTT CRAVEN N
DNOT DELIVERY NOTIFICATION 20/12/2012 0904 SCOTT CRAVEN N
ETAC JOB ETA CHANGED 20/12/2012 0902 SCOTT CRAVEN N
TS TRANSHIPMENT NOTIFICATION 20/12/2012 0856 SCOTT CRAVEN N
JOBU JOB UPDATE 18/12/2012 1609 MICHAEL LUCY N
DEPM DEPOT MOVEMENT REQUEST 18/12/2012 1609 MICHAEL LUCY N
DEPM DEPOT MOVEMENT REQUEST 18/12/2012 1609 MICHAEL LUCY N
DEPM DEPOT MOVEMENT REQUEST 18/12/2012 1600 MICHAEL LUCY N
DEPM DEPOT MOVEMENT REQUEST 18/12/2012 1540 MICHAEL LUCY N
CARA CARGO AVAILABILITY 11/12/2012 1331 HELEN STAPELY N
JOBU JOB UPDATE 11/12/2012 1330 HELEN STAPELY N
TS TRANSHIPMENT NOTIFICATION 11/12/2012 1328 HELEN STAPELY N
JOBA JOB ADD 11/12/2012 1328 HELEN STAPELY N
OK Delete Email Details Add
OVR


Add Manual Event
Event type
Date & Time
VARIOUS DATES
CODE DESCRIPTION TYPE
VARDATES - EXPEDIENT DEVELOPMENT
File View GMA Maint. Help
Add Update Delete Find Browse Previous Next
VARIOUS DATES
Code AQC
Description AQIS CLEAR
Event Type System
Details
Customs (AU)
This event is created when an entry is successfully lodged with Customs and is not held pending AQIS inspection.
If the entry is held pending AQIS inspection then this event will be created when the entry is ATD Finalised.
OVR

Three	Start Adding your milestones into the system.




Import Job Milestone Set Up - EXPEDIENT DEVTEST
File View Options GMA Maint. Help
Add Update Delete Find Browse Previous Next
Import Job Milestone Set Up
Dept NIS NSW IMPORT SEA
Job Type Freight Forwarding
Mode Type SEAFREIGHT
Container Class All Container Types
Milestone Description Sequence Status Manual Event NA By Default Transhipment Event Hours Condition Event/Date Category
AN ARRIVAL NOTICE 20 Active No No No 48 PRIOR TO ETA FORWARDING
DOD DATE OF DELIVERY 130 Active No No No FORWARDING
DDHO DOCS TO CARRIER (DOCUMENT HANDOV... 90 Active Yes No No FORWARDING
DTB DOC TO BROKER 45 Active Yes No No 120 FORWARDING
IPST INVOICE RAISED TO CUSTOMER 120 Active No No No 24 NO LATER THAN ETA ACCOUNTING
JOBA JOB ADD 10 Active No No No
JCOM JOB COMPLETED 99999 Active No No No
CPAY PAYMENT TO SHIPPING LINE 60 Active Yes No No 24 PRIOR TO ETA FORWARDING
PRE PRE-ALERT TO TRANSPORT CARRIER 30 Active Yes No No FORWARDING
RTMC RAIL RELEASE MANUAL CONFIRMATION 80 Active Yes No No FORWARDING
RSN RAIL STACK NOTIFICATION 50 Active Yes No No FORWARDING
SCAL SCA SUCCESSFULLY SUBMITTED 40 Active No No No 48 PRIOR TO ETA FORWARDING
DO SHIPPING LINE DELIVERY ORDER 70 Active Yes No No FORWARDING
TS TRANSHIPMENT NOTIFICATION 15 Active No No Yes 336 PRIOR TO ETA
Changed By deanf Changed On 14/05/2013

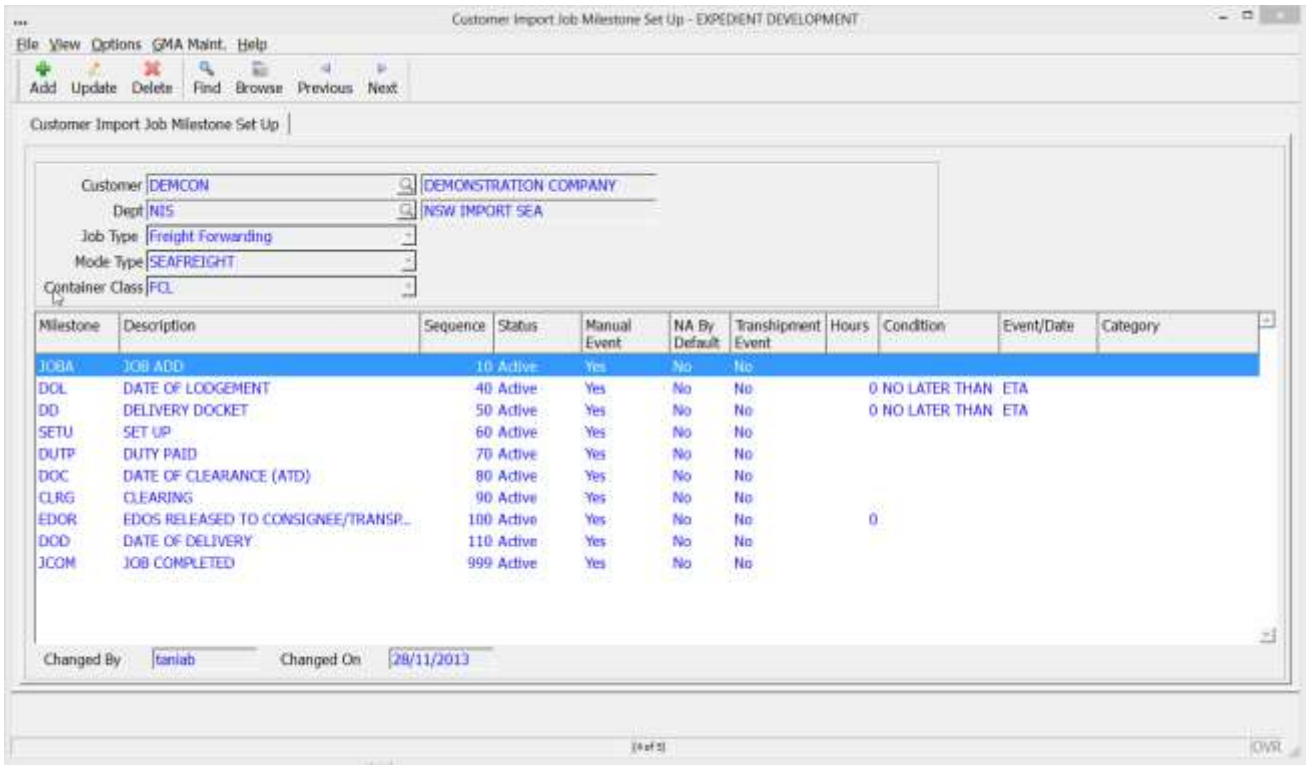
Field Name	Description	Validation	Default
Department	Enter or press Zoom to select a valid department or “ALL” for all departments.	Mandatory	ALL
Job Type	Enter or select a valid job type from the drop down list. A valid job type can be selected from: • Customs • Freight Forwarding • Both Customs and Freight Forwarding • All	Mandatory	Blank

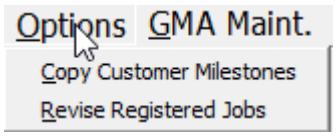
Field Name	Description	Validation	Default
Some Helpful Hints	*What does a job type of "Customs" mean?* A job type of "Customs" means that the customs work for these jobs is being done by your company. Within the Expedient System this means that the Customs Broker that you have entered in the Import Job Registration screen is defined in the Customer Master file as "Own Company". Note: The job type "Customs" means "Customs Only". That is, the freight forwarding is not done by your company.		
Some Helpful Hints	*What does a job type of "Freight Forwarding" mean?* A job type of "Freight Forwarding" means that the freight forwarding work for these jobs is being done by your company. Within the Expedient System this means that the Forwarder that you have entered in the Import Job Registration screen is defined in the Customer Master file as "Own Company". Note: The job type "Freight Forwarding" means "Freight Forwarding Only". That is, the customs work is not done by your company.		
Some Helpful Hints	*What does a job type of "Both Customs and Freight Forwarding" mean?* A job type of "Both Customs and Freight Forwarding" means that the customs and the freight forwarding work for these jobs is being done by your company. Within the Expedient System this means that the Broker and the Forwarder that you have entered in the Import Job Registration screen is defined in the Customer Master file as "Own Company".		
Some Helpful Hints	*What does a job type of "All" mean?* A job type of "All" applies to all jobs.		

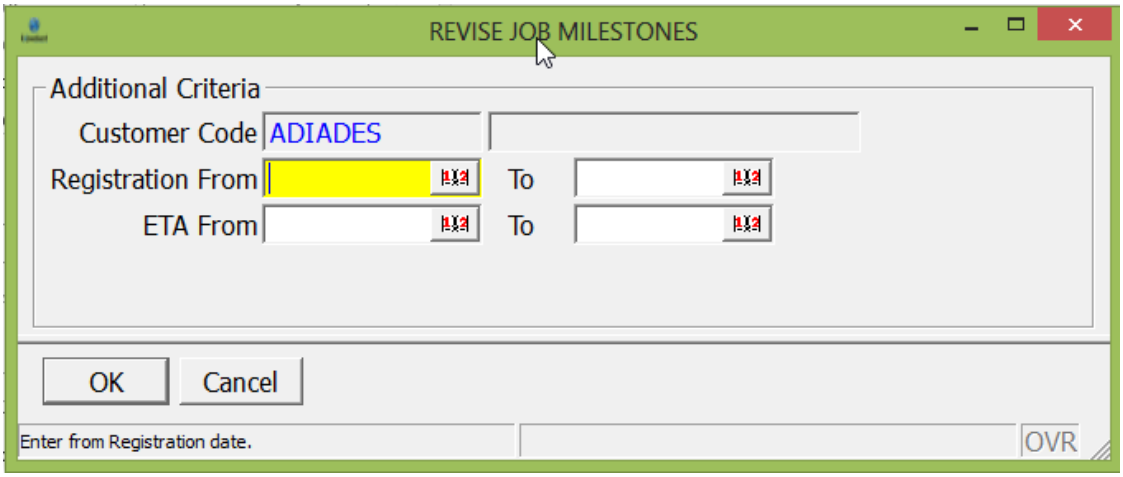
Field Name	Description	Validation	Default
Mode Type	Enter or select a valid mode type from the drop down list. Valid mode types include Sea, Air and All. The list of mode types is equivalent to the Zoom list in the "Job Type" field in the Import Job Registration Screen.	Mandatory	Blank
Container Class	Enter or select a valid container class from the drop down list. Valid container types include FCL, LCL and "All Container Types". The list of mode types is equivalent to the drop down list in the "Job Class" field in the Import Job Registration Screen.	Mandatory	Blank
Some Helpful Hints	*What container class is applicable to "AirFreight"?* The Container class is only relevant to SeaFreight, so for all other mode type use "All Container Types".		

Customer Import Milestones

Import job milestones that are specific to a customer can be defined on this screen. Customer specific milestones are searched first to find a match for the job profile before going back to the import job milestone set-up. The milestone selection rules as defined below are the same for customer specific milestones and job milestones.


Customer Import Job Milestone Set Up - EXPEDIENT DEVELOPMENT
File View Options GMA Maint. Help
Add Update Delete Find Browse Previous Next
Customer Import Job Milestone Set Up
Customer DEMCON DEMONSTRATION COMPANY
Dept NIS NSW IMPORT SEA
Job Type Freight Forwarding
Mode Type SEAFREIGHT
Container Class FCL
Milestone Description Sequence Status Manual Event NA By Default Transhipment Event Hours Condition Event/Date Category
JOBA JOB ADD 10 Active Yes No No
DOL DATE OF LODGEMENT 40 Active Yes No No 0 NO LATER THAN ETA
DD DELIVERY DOCKET 50 Active Yes No No 0 NO LATER THAN ETA
SETU SET UP 60 Active Yes No No
DUTP DUTY PAID 70 Active Yes No No
DOC DATE OF CLEARANCE (ATD) 80 Active Yes No No
CLRG CLEARING 90 Active Yes No No
EDOR EDOS RELEASED TO CONSIGNEE/TRANSP... 100 Active Yes No No 0
DOD DATE OF DELIVERY 110 Active Yes No No
JCOM JOB COMPLETED 999 Active Yes No No
Changed By taniab Changed On 28/11/2013

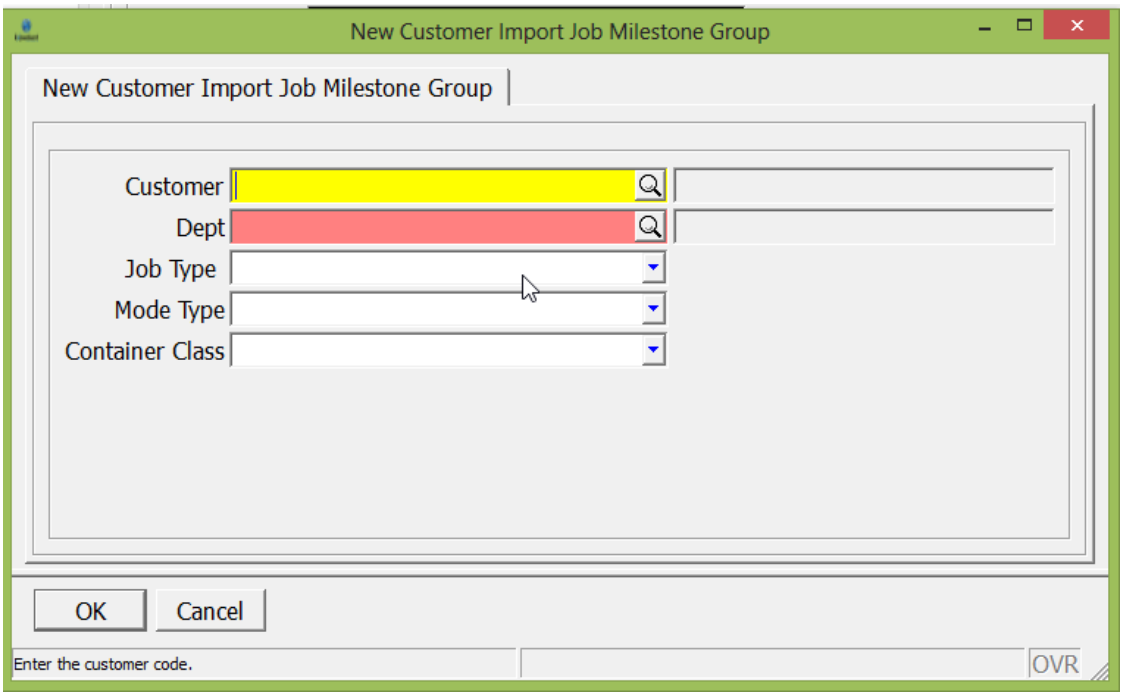

Options GMA Maint.
Copy Customer Milestones
Revise Registered Jobs

Revise Registered Jobs	Any modifications made to the job milestone set-up are only reflected in any jobs created *after* those modifications have been saved. If you want the modifications to apply to jobs created *before* the modifications were made then use this option. This option will revise the job milestones for all jobs that match the job profile of the currently displayed set of milestones for this customer. Revising milestones will recreate the milestones but preserve any completed or not applicable updates that have been made by the user to milestones that did not change. The following screen will be displayed: 

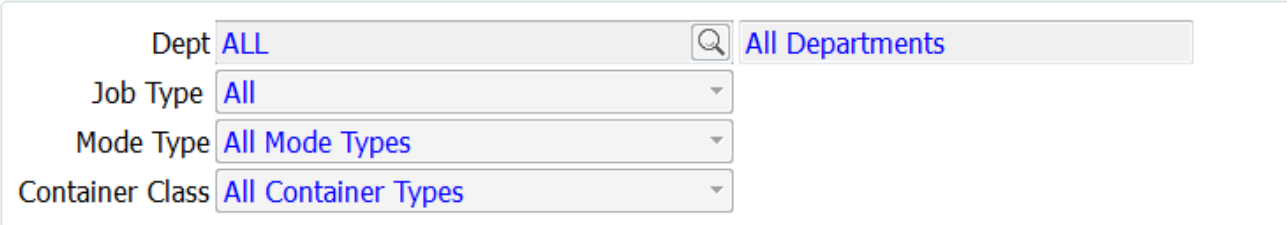
Field Name	Validation
Customer Code	Display Only
Registration From and To Dates	Optional but either this or the ETA date range must be entered
ETA From and To Dates	Optional but either this or the Registration date range must be entered

A limit of 120 days on the date range is applied.

Copy Customer Milestones	This option allows you to copy the currently displayed set of milestones. When selecting this option you will be required to enter the new Customer and Job Milestone profile information.



As you can probably tell by now, you can set up a different set of job milestones for different job profiles. That is, you can set up a different set for Air Freight, a different set for Sea Freight FCL etc. As a catch all for any job that does not match any of the specific profiles that you have set up, there is the "ALL" group. This is the default group and has the following values:



Job Milestone Selection

Job Milestones are allocated to a each import job on creation. The selection of which milestones will be allocated to a job occurs in the order defined in the table below. You will notice that the process

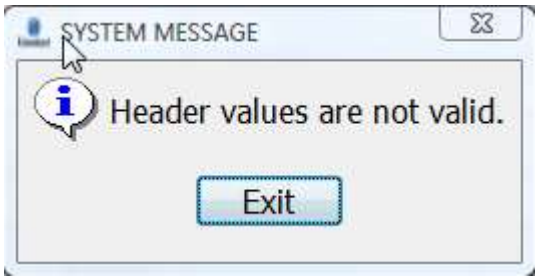
proceeds from an attempt to make an exact match on the job profile progressively to a more general match on job profile.

Match Attempt	Dept	Job Type (Customs, Freight Forwarding, Both Customs and Freight Forwarding, All)	Mode Type (SeaFreight, AirFreight etc)	Container Class (FCL, LCL etc)
1	Exact Match	Exact Match	Exact Match	Exact Match
2	Exact Match	Exact Match	Exact Match	All Container Types
3	Exact Match	All Job Types	Exact Match	Exact Match
4	Exact Match	Exact Match	All Mode Types	Exact Match
5	Exact Match	All Job Types	All Mode Types	Exact Match
6	Exact Match	Exact Match	All Mode Types	All Container Types
7	Exact Match	All Job Types	All Mode Types	All Container Types
8	All Departments	All Job Types	Exact Match	All Container Types
9	All Departments	All Job Types	All Mode Types	All Container Types

When setting up milestones for the first time you can start out by setting up the last two profiles and then progressively add more specific milestones.

1	All Departments	All Job Types	SeaFreight	All Container Types
2	All Departments	All Job Types	AirFreight	All Container Types
3	All Departments	All Job Types	All Mode Types	All Container Types

Please note that you will only be able to enter milestone header values that match one of the above 9 templates. If you enter a milestone profile that is different, the validation will display the following message:



Field Name	Description	Validation	Default
Milestone	Enter or use the Zoom button to select an event code.	Mandatory	Blank
Some Helpful Hints	The first milestone is always “JOBA”. This event is created automatically by the system when a job is added via job registration or any other process that adds jobs into the system.		
Some Helpful Hints	The last milestone is always “JCOM”. This event is completed automatically by the system when all the previous milestones have been completed or marked as non-applicable. Since this is the last milestone, it is always a good idea to give it a high sequence number like 9999.		
Description	This displays the description of the event.	None	Display Only
Sequence	A positive number indicating the numeric sequence in which the milestones are expected to be completed. NOTE: Milestones can be completed out of sequence.	Mandatory	Blank

<table>
<tr><th>Field Name</th><th>Description</th><th>Validation</th><th>Default</th></tr>
<tr><td>Status</td><td>A milestone must be marked as active in order to be allocated a job when it is created.

If a milestone is marked as an “Exception” milestone, then it is not added to the milestones allocated to any particular job until the exception occurs.

<table><tr><th>Exception Event</th><th>Milestone Added</th></tr><tr><td>CRL – Customs Red Line</td><td>CRLC – Customs Red Line Cleared</td></tr><tr><td>AQH – AQIS Hold</td><td>AQC – AQIS Cleared</td></tr><tr><td>IFIP – Import Food Inspection Program Hold</td><td>IFIS – Import Food Inspection Service</td></tr></table></td><td>Mandatory</td><td>Y</td></tr>
<tr><td>Some Helpful Hints</td><td>The CRL, AQH, IFIP events will be generated if this status is returned from Customs. The associated “Cleared” milestone should be added to your milestone setup as an Exception milestone in order for it to be added to the job milestone when the exception condition occurs. See example below.

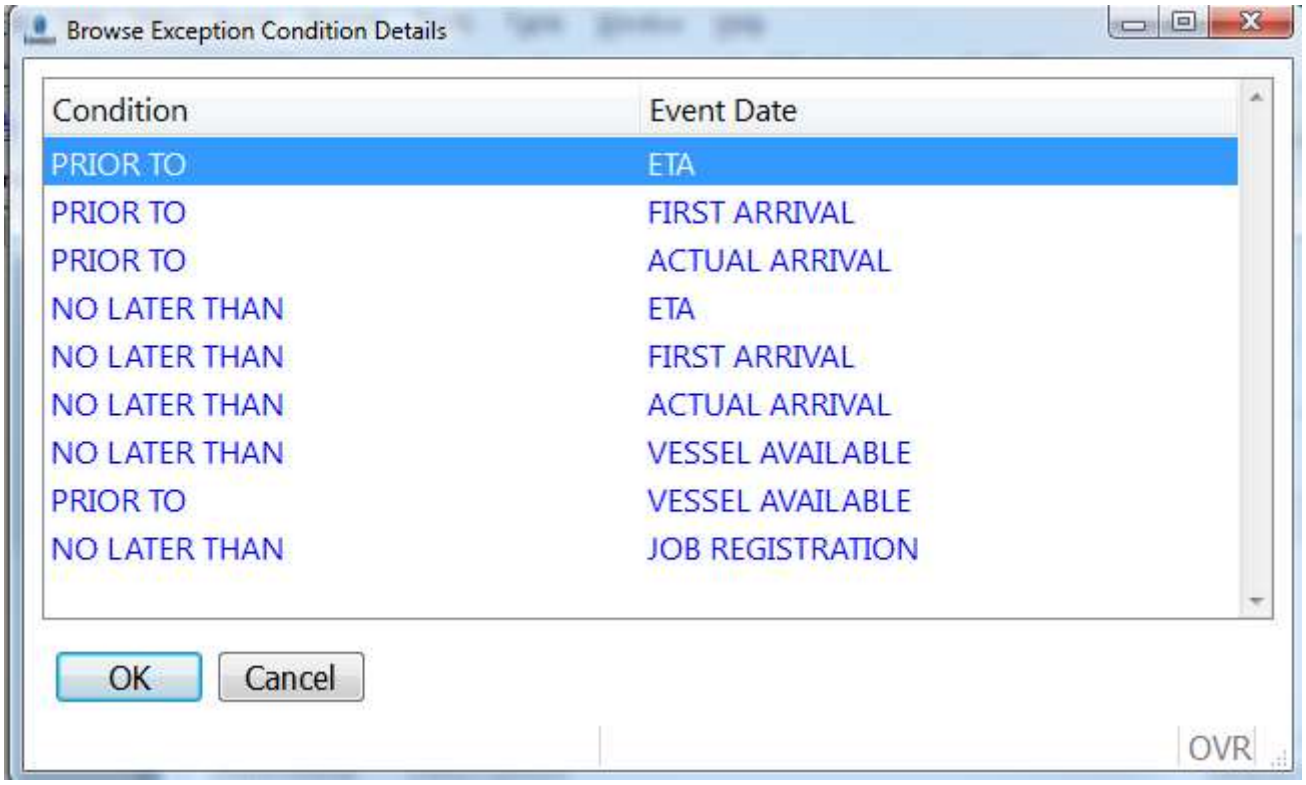
Please note that the “Cleared” milestone events will be completed when the ATD is finalised (ie. When a DOC – Date Of Clearance Event is generated)</td><td></td><td></td></tr>
<tr><td>Manual Event</td><td>Manual milestones are milestones that are marked as completed by the user.

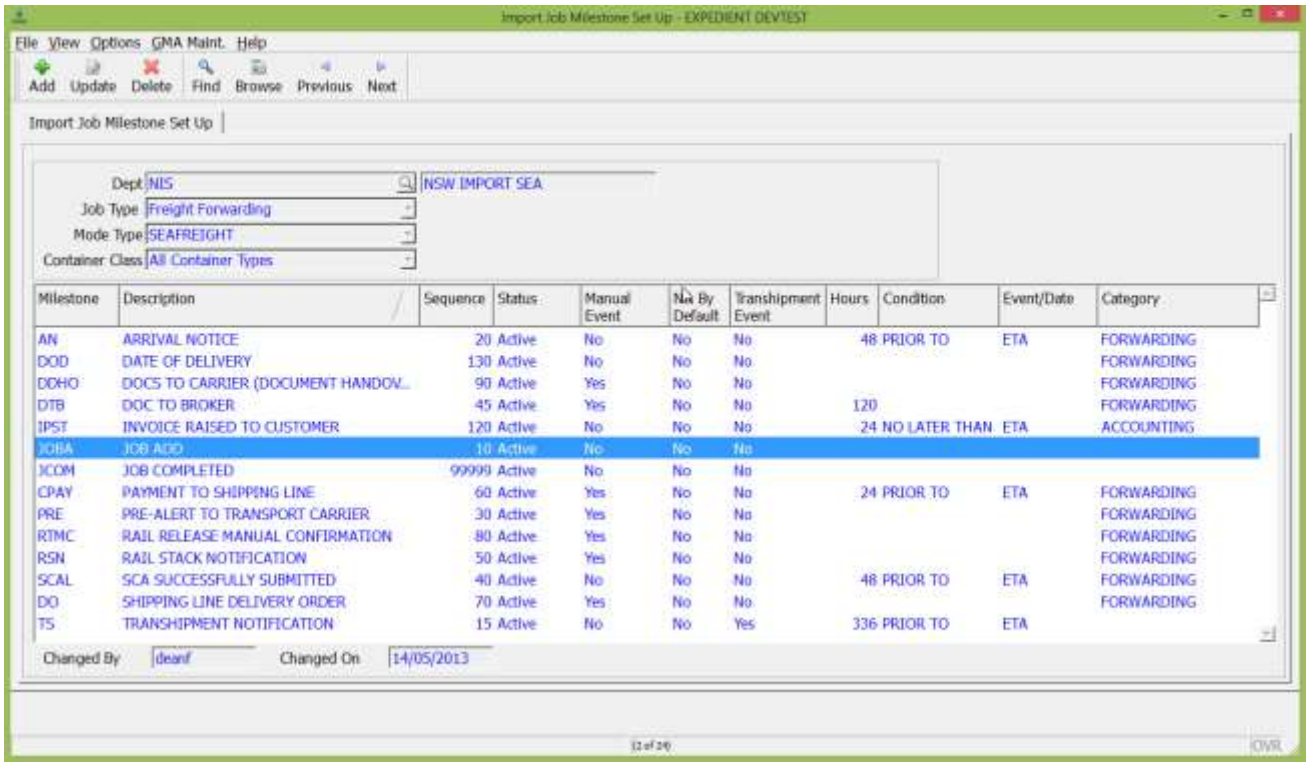
There is no system process that creates this event automatically (and hence completes the milestone).

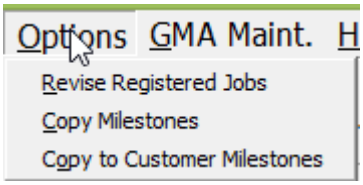
These are usually used for tasks that need to be completed outside of the Expedient system. Once the task is complete, the user will go into the Milestones screen from Job Registration and tick the checkbox to say that the milestone is completed or enter a date and time of completion.</td><td>None</td><td>Display Only</td></tr>
</table>

Field Name	Description	Validation	Default
NA By Default	Milestones marked NA by default will be created against the job with the Not Applicable flag set to Y. This means that the milestone will not affect the status of the job unless the user elects to untick it and make it applicable.	Mandatory	N
Transhipment Event	This indicates that this milestone is only applicable to jobs where the Vessel on the job registration screen is on a transhipment vessel.	Mandatory	N
Some Helpful Hints	*What makes a job a transhipment?* In the job registration screen, if the vessel code entered has a vessel name of "TRANSHIPMENT" in the Vessels Master file.		
Some Helpful Hints	*What is special about transhipment milestones?* When a transhipment job is updated so that it is no longer on a transhipment vessel, then the transhipment milestones are removed from job's milestones.		

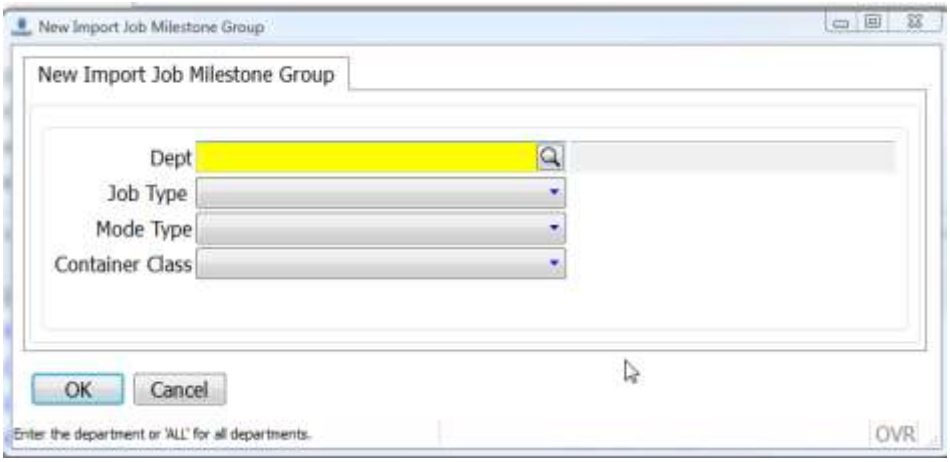
Field Name	Description	Validation	Default
Hours,Condition,Event/Date	These fields are used for specifying exceptions on a milestone. Enter the number of hours (usually in 24 hour amounts) and click on the Zoom button that appears. This will show you the list of conditions that can be used for specifying exceptions. The exception conditions should be read as follows: Should be completed X Hours PRIOR TO <Event Date> Eg. Should be completed 24 Hours PRIOR TO ETA Should be completed NO LATER THAN X Hours AFTER Event Date Eg. Should be completed NO LATER THAN 48 Hours After Job Registration Expedient can ensure that Exceptions do not fall on weekends. Please contact Expedient Software if you would like to stop exceptions falling on Saturdays and Sundays	Optional	Blank
Category	This is the category of the milestone. Select a category from the drop down list. Refer : Definition of Milestone Categories This is used to indicate the type of work of the milestone.	Optional	Blank

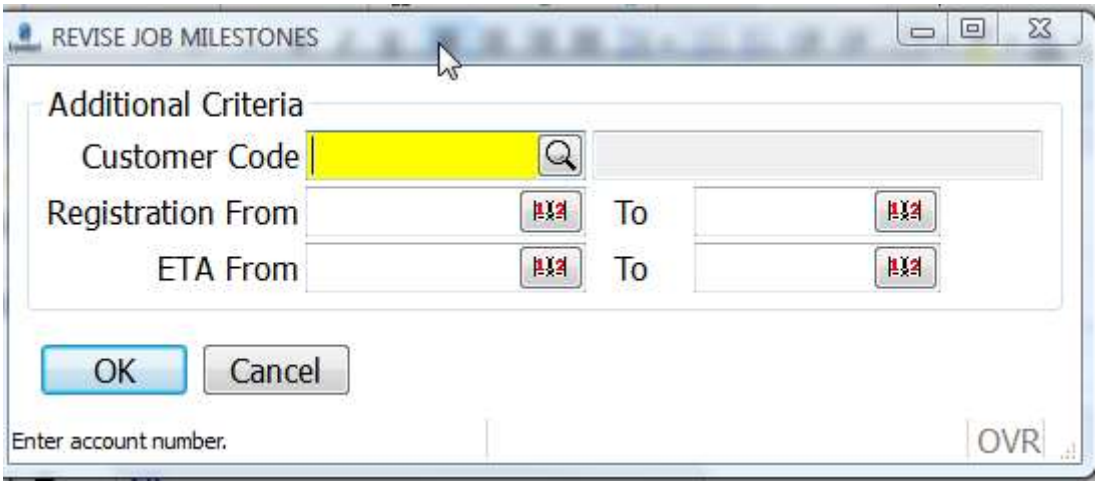

Browse Exception Condition Details
Condition
Event Date
PRIOR TO
ETA
PRIOR TO
FIRST ARRIVAL
PRIOR TO
ACTUAL ARRIVAL
NO LATER THAN
ETA
NO LATER THAN
FIRST ARRIVAL
NO LATER THAN
ACTUAL ARRIVAL
NO LATER THAN
VESSEL AVAILABLE
PRIOR TO
VESSEL AVAILABLE
NO LATER THAN
JOB REGISTRATION
OK
Cancel
OVR


Import Job Milestone Set Up - EXPEDIENT DEVTEST
File View Options GMA Maint. Help
Add Update Delete Find Browse Previous Next
Import Job Milestone Set Up
Dept NIS NSW IMPORT SEA
Job Type Freight Forwarding
Mode Type SEAFREIGHT
Container Class All Container Types
Milestone | Description | Sequence | Status | Manual Event | Not By Default | Transhipment Event | Hours | Condition | Event/Date | Category
AN | ARRIVAL NOTICE | 20 | Active | No | No | No | 48 | PRIOR TO | ETA | FORWARDING
DOD | DATE OF DELIVERY | 130 | Active | No | No | No | | | | FORWARDING
DDHO | DOCS TO CARRIER (DOCUMENT HANDOV... | 90 | Active | Yes | No | No | | | | FORWARDING
DTB | DOC TO BROKER | 45 | Active | Yes | No | No | 120 | | | FORWARDING
IPST | INVOICE RAISED TO CUSTOMER | 120 | Active | No | No | No | 24 | NO LATER THAN | ETA | ACCOUNTING
JOBA | JOB ADD | 10 | Active | No | No | No | | | | |
JCOM | JOB COMPLETED | 99999 | Active | No | No | No | | | | |
CPAY | PAYMENT TO SHIPPING LINE | 60 | Active | Yes | No | No | 24 | PRIOR TO | ETA | FORWARDING
PRE | PRE-ALERT TO TRANSPORT CARRIER | 30 | Active | Yes | No | No | | | | FORWARDING
RTMC | RAIL RELEASE MANUAL CONFIRMATION | 80 | Active | Yes | No | No | | | | FORWARDING
RSN | RAIL STACK NOTIFICATION | 50 | Active | Yes | No | No | | | | FORWARDING
SCAL | SCA SUCCESSFULLY SUBMITTED | 40 | Active | No | No | No | 48 | PRIOR TO | ETA | FORWARDING
DO | SHIPPING LINE DELIVERY ORDER | 70 | Active | Yes | No | No | | | | FORWARDING
TS | TRANSHIPMENT NOTIFICATION | 15 | Active | No | No | Yes | 336 | PRIOR TO | ETA |
Changed By deanf Changed On 14/05/2013
OVR



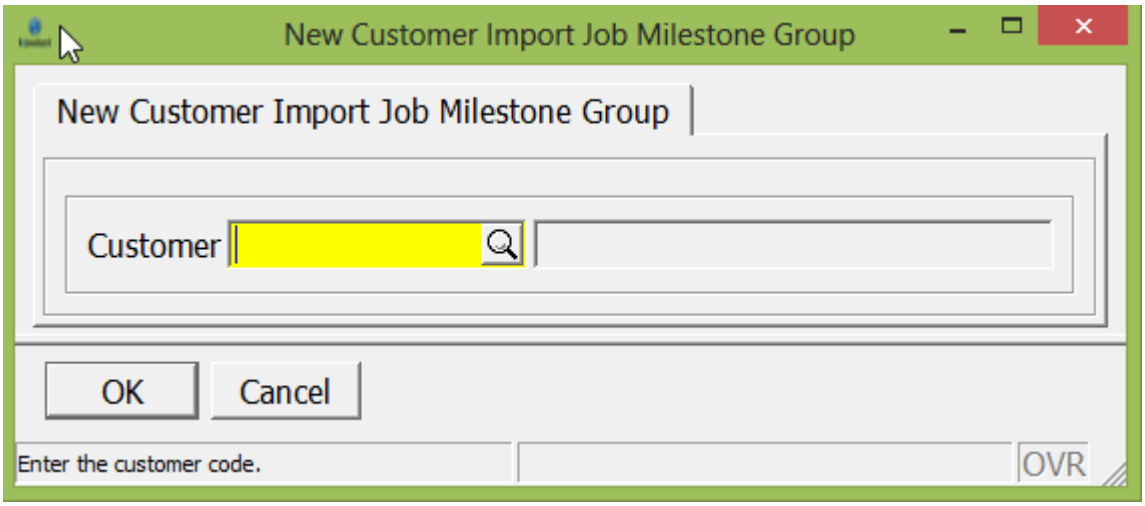
Option	Description
Copy Milestones	This option allows you to copy the currently displayed set of milestones. When selecting this option you will be required to enter the new Job Milestone profile information.



Option	Description
Revise Registered Jobs	Any modifications made to the job milestone set-up are only reflected in any jobs created *after* those modifications have been saved. If you want the modifications to apply to jobs created *before* the modifications were made then use this option. This option will revise the job milestones for all jobs that match the job profile of the currently displayed set of milestones. Revising milestones will recreate the milestones but preserve any completed or not applicable updates that have been made by the user to milestones that did not change. The following screen will be displayed:  A limit of 120 days on the date range is applied.

Field Name	Validation
Customer Code	Optional
Registration From and To Dates	Optional but either this or the ETA date range must be entered
ETA From and To Dates	Optional but either this or the Registration date range must be entered

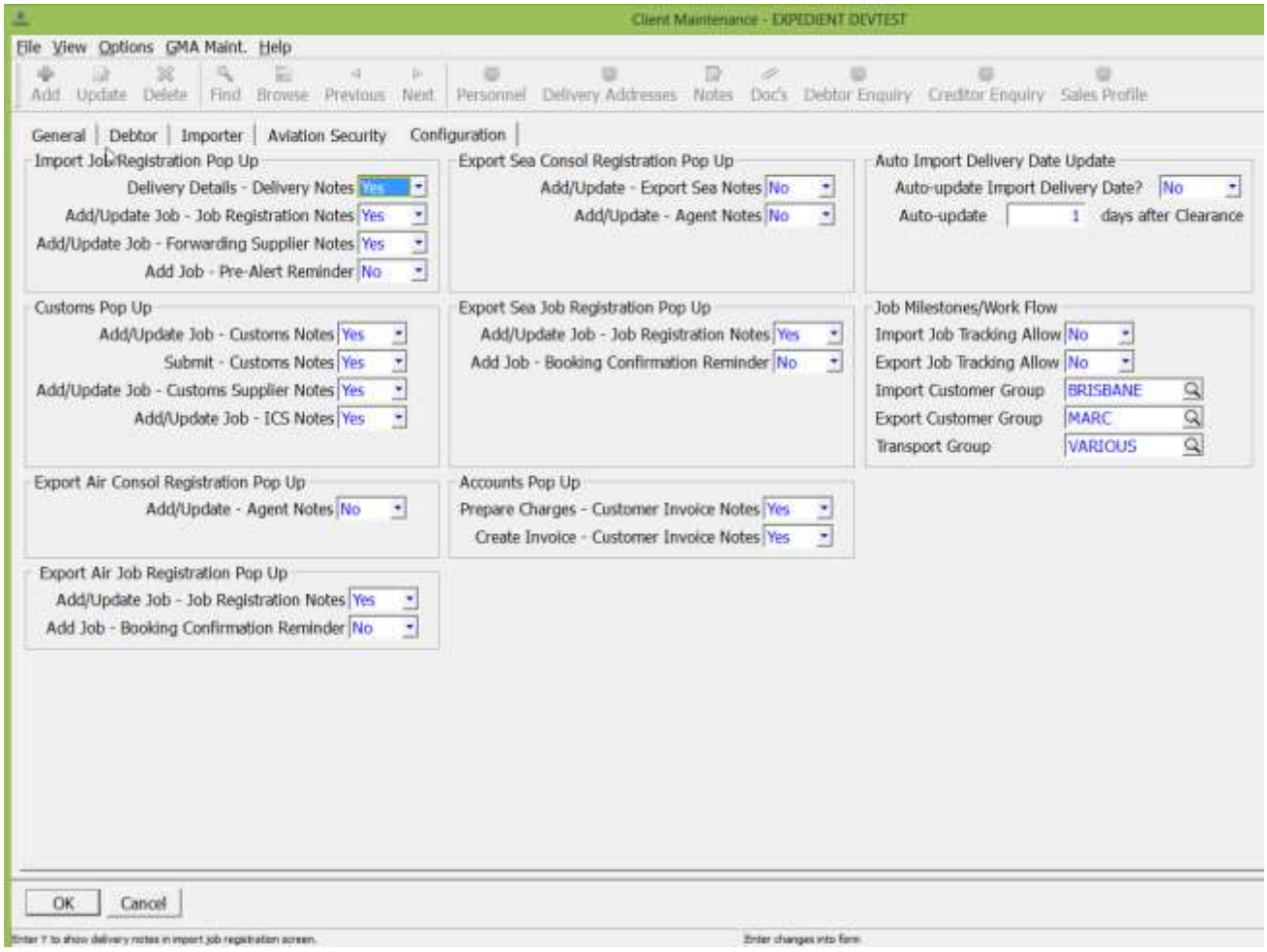
Option	Description
Copy to Customer Milestones	This option allows you to copy the currently displayed set of milestones to a specific customer. These milestones can then be updated in the Customer Import Milestones screen. When selecting this option, you will be required to enter a valid customer code.



Customer Set Up

Customer Level Job Tracking

Now that you have set up your import job milestones, it is time to turn on the Job Tracking module. The first decision you have to make is whether to use job tracking for all customers and all jobs or to enable it on a customer by customer basis. If you elect to enable on a customer by customer basis then you need to turn job tracking on for those customers in the Customer Master file.

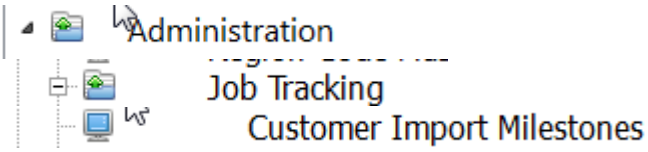

Client Maintenance - EXPEDIENT DEVTEST
File View Options GMA Maint. Help
Add Update Delete Find Browse Previous Next Personnel Delivery Addresses Notes Doc's Debtor Enquiry Creditor Enquiry Sales Profile
General Debtor Importer Aviation Security Configuration
Import Job Registration Pop Up
Delivery Details - Delivery Notes Yes
Add/Update Job - Job Registration Notes Yes
Add/Update Job - Forwarding Supplier Notes Yes
Add Job - Pre-Alert Reminder No
Export Sea Consol Registration Pop Up
Add/Update - Export Sea Notes No
Add/Update - Agent Notes No
Auto Import Delivery Date Update
Auto-update Import Delivery Date? No
Auto-update 1 days after Clearance
Customs Pop Up
Add/Update Job - Customs Notes Yes
Submit - Customs Notes Yes
Add/Update Job - Customs Supplier Notes Yes
Add/Update Job - ICS Notes Yes
Export Sea Job Registration Pop Up
Add/Update Job - Job Registration Notes Yes
Add Job - Booking Confirmation Reminder No
Job Milestones/Work Flow
Import Job Tracking Allow No
Export Job Tracking Allow No
Import Customer Group BRISBANE
Export Customer Group MARC
Transport Group VARIOUS
Export Air Consol Registration Pop Up
Add/Update - Agent Notes No
Accounts Pop Up
Prepare Charges - Customer Invoice Notes Yes
Create Invoice - Customer Invoice Notes Yes
Export Air Job Registration Pop Up
Add/Update Job - Job Registration Notes Yes
Add Job - Booking Confirmation Reminder No
OK
Cancel

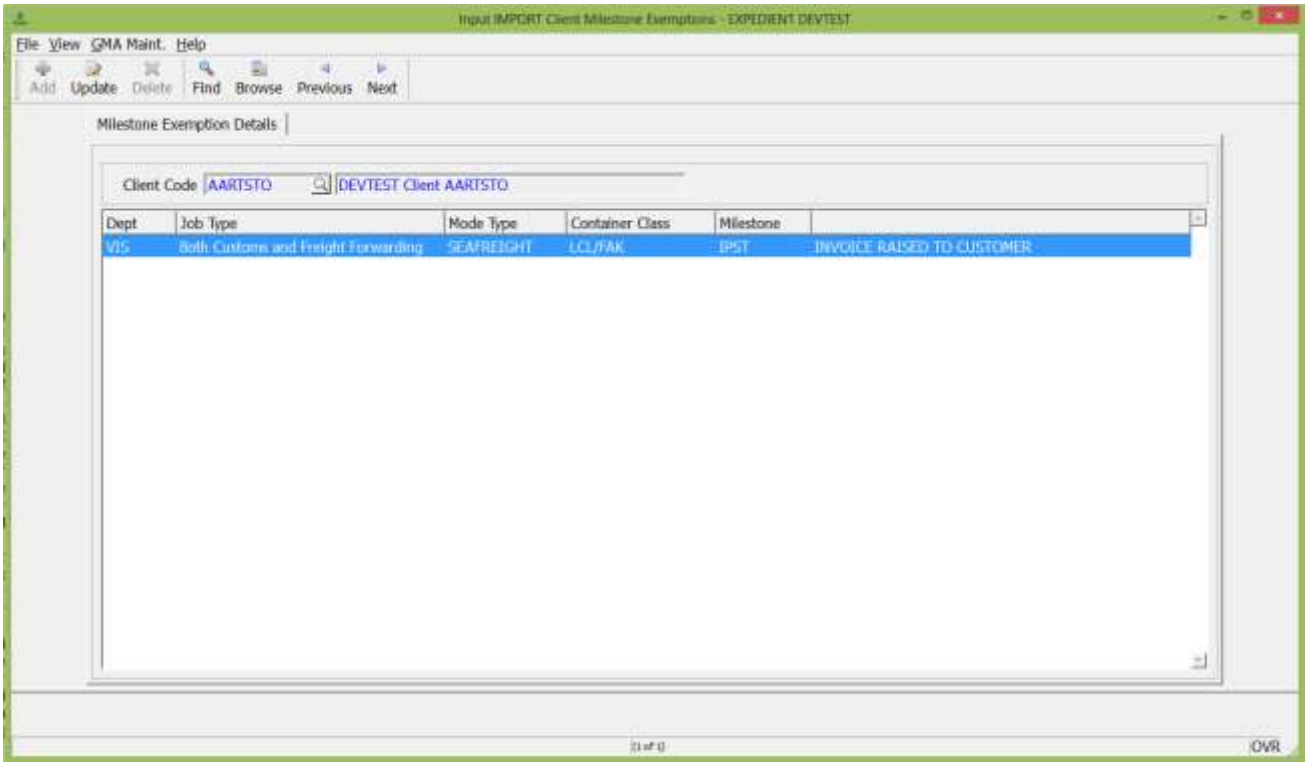
Field Name	Description	Validation	Default
Import Job Tracking Allow	Enable Import Job Tracking When Import Job Tracking is enabled, import jobs created for this customer will be allocated milestones. Note: This flag is only used when job tracking is set at the customer level instead of system wide.	Optional	No

Field Name	Description	Validation	Default
Export Job Tracking Allow	Enable Export Job Tracking When Export Job Tracking is enabled, export jobs created for this customer will be allocated milestones. Note: This flag is only used when job tracking is set at the customer level instead of system wide.	Optional	No
Import Customer Group	A free text field up to 10 characters that is used to categorize this customer for the purposes of import workflow. More details on the use of this field are described in the section below on workflow groups. Sometimes, the needs of some customers are specialized so that their jobs are processed by a particular group of staff with expertise in that area. For instance “AUTO” for Automotive or “PHARMA” for Pharmacueticals, or “AUTO” for Automotive. This group can be used so that jobs for these customers are only shown in the workflow of those staff that specialize in this area. A customer group can be overridden by destination port enabling the handling of the customer’s jobs to be handled differently in different states if required. Please refer to the section below on “Customer Group Overrides”.	Optional	Blank
Export Customer Group	A free text field up to 10 characters that is used to categorize this customer for the purposes of export job tracking workflow.	Optional	Blank
Transport Group	A free text field up to 10 characters that is used to categorize this customer for the purposes of transport workflow. More details on the use of this field are described in the section below on workflow groups.	Optional	Blank

Customer Import Milestone Exemptions

Now, remember when we set up job milestones we did this by *job profile*. So we set up the milestones that we thought we needed for different types of jobs like Sea Freight LCL or Air Freight. Sometimes some of these milestones are just not applicable for some customers. To exempt some milestones for some customers use the “Customer Milestone Exemptions” screen.




File View GMA Maint. Help
Add Update Delete Find Browse Previous Next
Milestone Exemption Details
Client Code AARTSTO DEVTEST Client AARTSTO
Dept Job Type Mode Type Container Class Milestone
VIS Both Customs and Freight Forwarding SEAFREIGHT LCL/FAK IPST INVOICE RAISED TO CUSTOMER
OVR

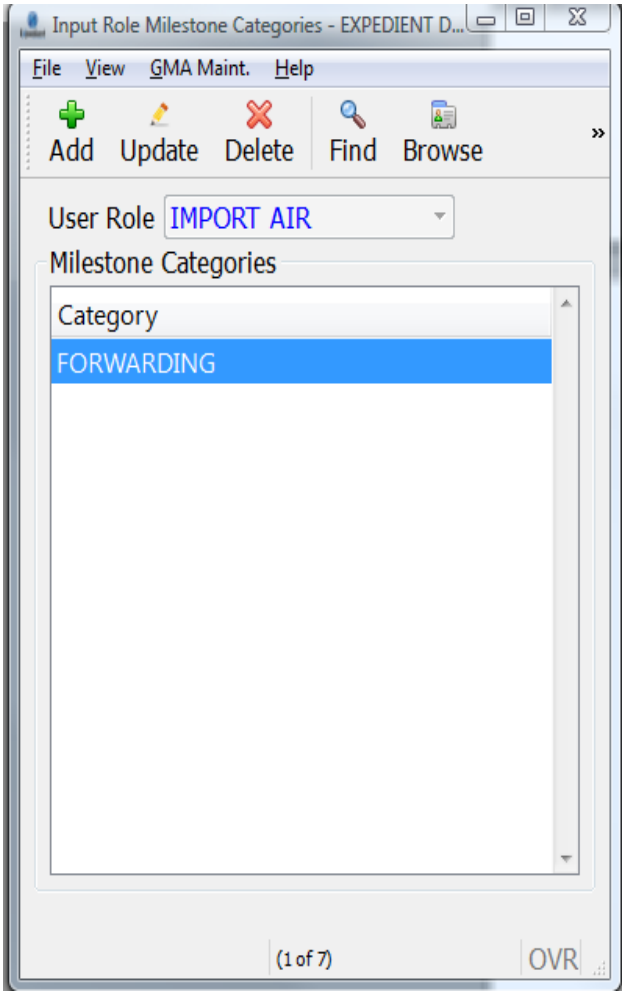
To enter a customer exemption:

- Select “F”ind from the Toolbar
- Enter or select a valid customer code from the Zoom List. Hit Enter.
- Select “U”pdate from the Toolbar. The cursor will move to the details portion of the screen.

Field Name	Description	Validation	Default
Dept	Enter a valid department or select a department from the Zoom list or enter “ALL” for all departments.	Mandatory	Blank
Job Type	Enter or select a valid job type from the drop down list. A valid job type can be selected from: • Customs • Freight Forwarding • Both Customs and Freight Forwarding • All	Mandatory	Blank

Field Name	Description	Validation	Default
Mode Type	Enter or select a valid mode type from the drop down list. Valid mode types include Sea, Air and All. The list of mode types is equivalent to the Zoom list in the “Job Type” field in the Import Job Registration Screen.	Mandatory	Blank
Container Class	Enter or select a valid container class from the drop down list. Valid container types include FCL, LCL and “All Container Types”. The list of mode types is equivalent to the drop down list in the “Job Class” field in the Import Job Registration Screen.	Mandatory	Blank
Milestone	Enter or select a valid event type from Zoom List.	Mandatory	Blank

Input Workflow Role Categories



Field Name	Description	Validation	Default
User Role	Select a role from the drop-down list. A default set of user roles are loaded as part of the Expedient system. If you require further user roles please raise and Expedient Support Ticket.		
Category	Select from the drop-down list one or more Milestone Categories. This drop down list is the same as that used in the "Import Job Milestones" screen when assigning a category to a milestone.		
Some Helpful Hints	The manager role should include all milestone categories.		

Select Find from the Toolbar options.

Select a role from the drop-down list.
Select Update from the Toolbar options.
Select from the drop-down list one or more Milestone Categories. This drop down list is the same as that used in the “Import Job Milestones” screen when assigning a category to a milestone.

What this does is tie job milestones to a user role (ie who does what) at a high level. We can then assign a role to a user within a particular work group/team.

Input Workflow Work Groups

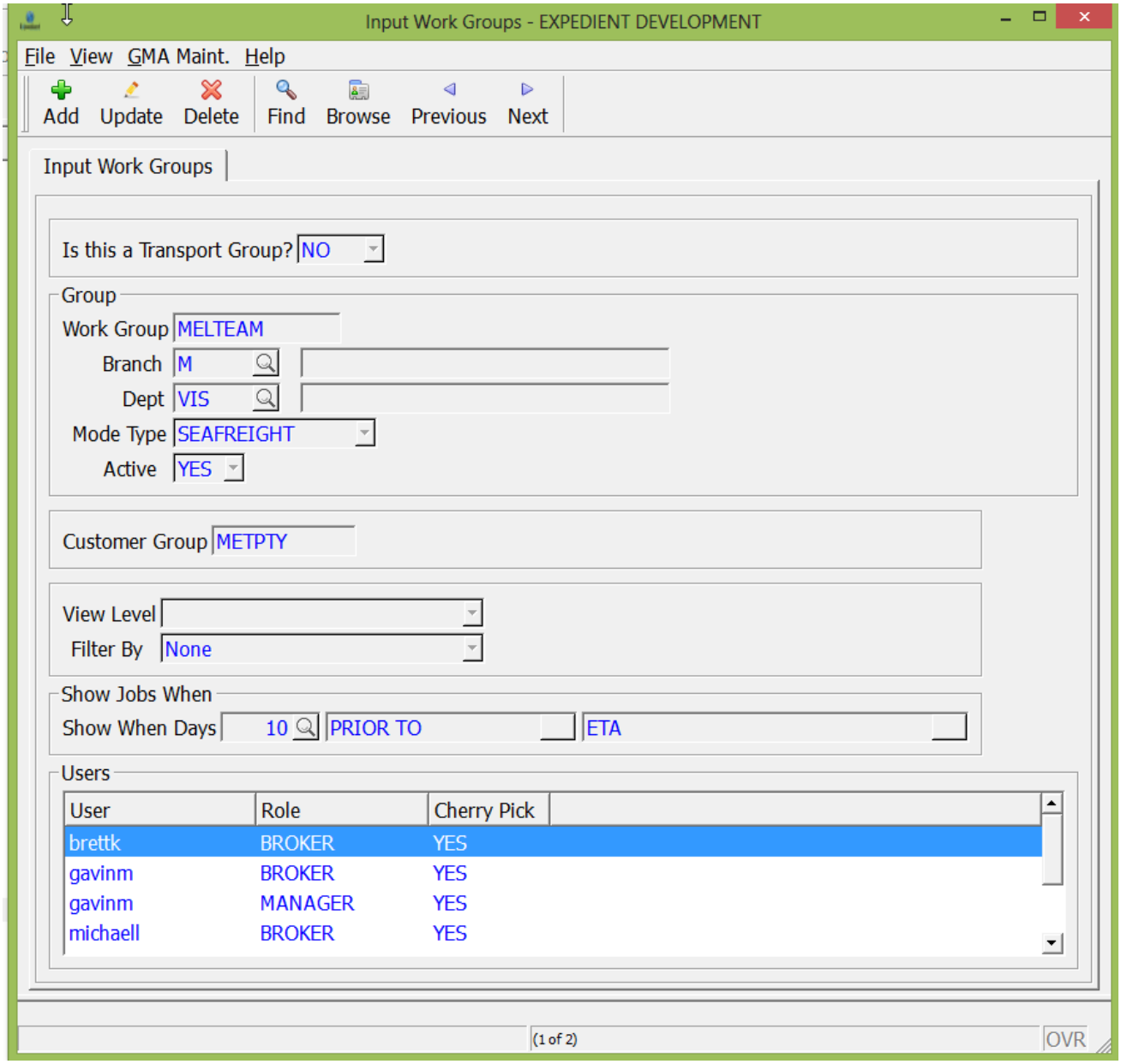
So far you will have completed the following steps:

1. Set up milestones and given each milestone a category.

2. Set up user roles and given each role one or more milestone category.

Now you want to tell the System how your office works. Which section of your option does what kind of work and who within that section does what parts of that work. You may have multiple offices or one office with different sections, or just one office with a small group of staff that do all work for all jobs for all customers.

This screen allows you to define a workflow team. When defining a team you are really refining the type of jobs that will appear on the workflow screen of the users that are within those teams.

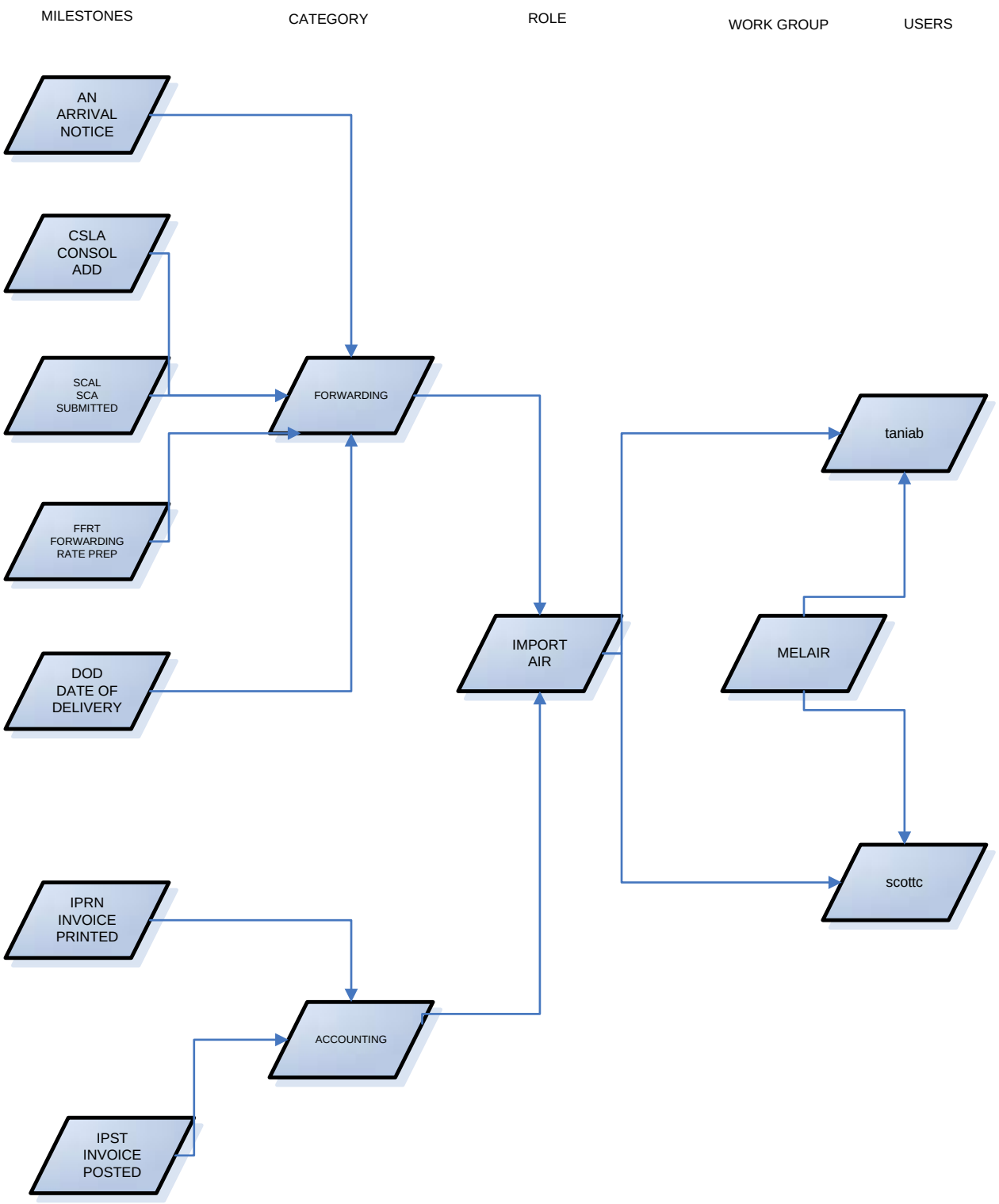


Field Name	Description	Validation	Default
Is this a Transport Group	When “Y”, the Customer Master File, Transport Group field is used for evaluating the jobs that will be shown in the workflow. When “N”, the Customer Master File, Customer Group field is used for evaluating the jobs that will be shown in the workflow.	Mandatory	Blank
Work Group	A free text name for this work group or team. This can be up to a maximum of 10 characters in length.	Mandatory	Blank
Branch	Enter or select a branch from the zoom list.	Mandatory	Blank
Dept	Enter or select a department from the zoom list. When not entered, all departments within the branch will be included in the user workflow search.	Optional	Blank
Mode Type	Select Sea Freight or Air Freight from the drop down list.	Mandatory	Blank
Active	You can set a group up as inactive until you are ready to enable it.	Mandatory	Blank
Customer Group	Enter a customer group. This will limit the workflow for this workflow group to customers with the same Customer Group in the Customer Master File Configuration tab. This field is only shown when the “Is this a Transport Group” field is “N”.	Optional	Blank
Transport Group	Enter a transport group. This will limit the workflow for this workflow group to customers with the same Transport Group in the Customer Master File Configuration tab. This field is only shown when the “Is this a Transport Group” field is “Y”.	Optional	Blank

Field Name	Description	Validation	Default
View Level	Select "All" or "General Group". This field is only required where the Customer Group is blank. 1. **All** – If you are a user in this team then you will see all jobs that match the other criteria for this group *including* customers that are classified into a particular customer group. 2. **General Group** - – If you are a user in this team then you will see all jobs that match the other criteria for this group *excluding* customers that are classified into a particular customer group.	Mandatory	Blank
Filter By	Select from one of the following: 1. **User Branch Destination Port Only** – When this option is selected the department in the work group setup is ignored and all jobs for the user's destination ports are displayed in workflow. 2. **Department Only** – When this option is selected all jobs for the work group department or branch are displayed in workflow regardless of destination port. 3. **User Branch Destination Port and Department** - When this option is selected all jobs for the user's destination ports are displayed in workflow for the work group department or branch. 4. **None** – The same as "Department Only"		

Field Name	Description	Validation	Default
Show Jobs When	This combination of fields allows you to set up a condition for when jobs will appear in the workflow that is only dependent on there being an outstanding step for the job that the user is responsible for and the show when condition. When this option is used, the normal condition of "the user must be responsible for the next step or for any skipped step" in the workflow of the job is overridden. Any outstanding step anywhere in the workflow of a job for which the user is responsible (skipped, next or future) will allow the job to appear in the workflow as long as the show when condition is met.		
Some Helpful Hints	*Enter the Show When Days and click on the ZOOM button to select the show when condition.*		
Some Helpful Hints	*What is "User Branch Destination Port Only" used for?* If a site has multiple offices (branches) but some customers jobs or some part of all jobs are always processed in one of the branches (ie transport) then this is a useful way of configuring the system so that the jobs appear in the correct workflow.		
Some Helpful Hints	*Where do I map destination ports to branches?* Use the "Import Ports For Branches" screen to map which ports are handled by which branch.		
User(Detail)	Enter or select a valid user	Mandatory	Blank
Role (Detail)	Enter or select a valid user role. A user can have more than one role within a team and can be a member of more than one team.	Mandatory	Blank
Cherry Pick (Detail)	When this is set to YES, the user can elect to work on any job in their workflow. When this is set to NO, the user must work on the jobs in their workflow in ETA order.	Mandatory	Blank
Some Helpful Hints	It is a good idea to allow cherry picking for all users initially.		

On the next page is an example of how workflow can be set up.



Workflow Job Selection

Customer Group	View Level	Filter By	Customer Group Overrides	Jobs displayed in work flow
Blank	ALL	None or Department Only	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role.
Blank	General	None or Department Only	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role. Only includes jobs for customers where the customer group is blank. Excludes any jobs for customers that have a customer group override for department/destination port.
Blank	ALL	User Branch Destination Port Only	Yes or No	All jobs for mode where the next step required to be done is within the user's role and the destination port is one of the user's branch ports.
Blank	General	User Branch Destination Port Only	Yes or No	All jobs for mode where the next step required to be done is within the user's role and the destination port is one of the user's branch ports. Only includes jobs for customers where the customer group is blank. Excludes any jobs for customers that have a customer group override for department/destination port.
Blank	ALL	User Branch Destination Port and Dept	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role and the destination port is one of the user's branch ports.

Customer Group	View Level	Filter By	Customer Group Overrides	Jobs displayed in work flow
Blank	General	User Branch Destination Port and Dept	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role and the destination port is one of the user's branch ports. Only includes jobs for customers where the customer group is blank. Excludes any jobs for customers that have a customer group override for department/destination port.
Non-Blank	N/A	None/Department Only	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role. Only includes: 1. Jobs for customers where the customer group matches the workgroup customer group. 2. Jobs for customers that have a customer group override for department/destination port and customer group matches the workgroup customer group.
Non-Blank	N/A	User Branch Destination Port Only	Yes or No	All jobs for mode where the next step required to be done is within the user's role and the destination port is one of the user's branch ports. Only includes: 1. Jobs for customers where the customer group matches the workgroup customer group. 2. Jobs for customers that have a customer group override for department/destination port and customer group matches the workgroup customer group.

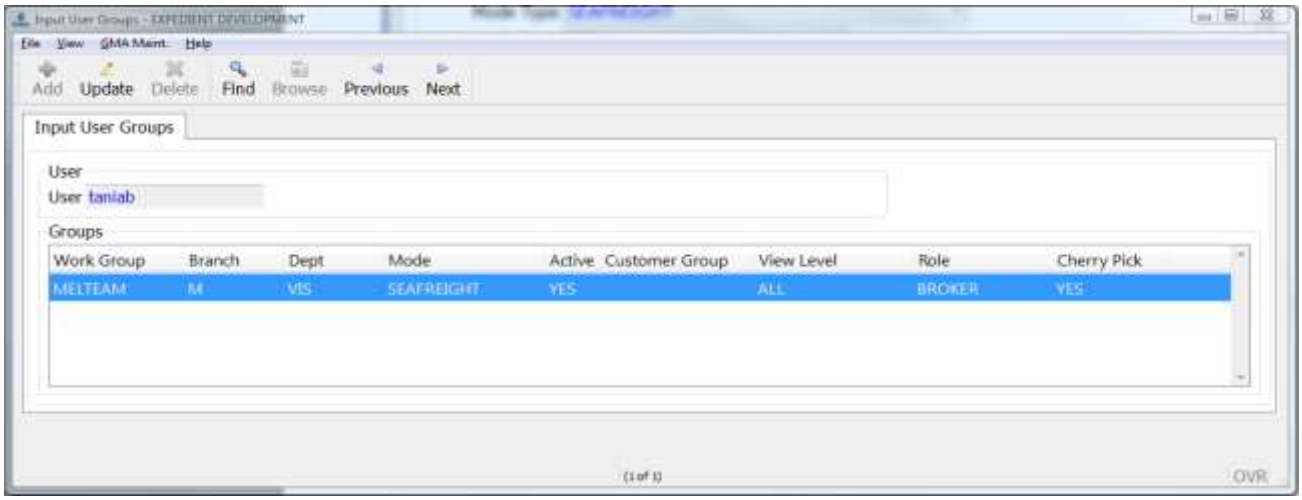
Customer Group	View Level	Filter By	Customer Group Overrides	Jobs displayed in work flow
Non-Blank	N/A	User Branch Destination Port and Dept	Yes or No	All jobs for mode and branch/department where the next step required to be done is within the user's role and the destination port is one of the user's branch ports. Only includes: 1. Jobs for customers where the customer group matches the workgroup customer group. 2. Jobs for customers that have a customer group override for department/destination port and customer group matches the workgroup customer group.

Update User Workflow Groups

This screen is a reverse view of the previous screen. It allows you to see all the workgroups of which a user is a member and to add or remove the user from work groups.

The following details can be updated on current groups:

1. Role
2. Cherry Pick

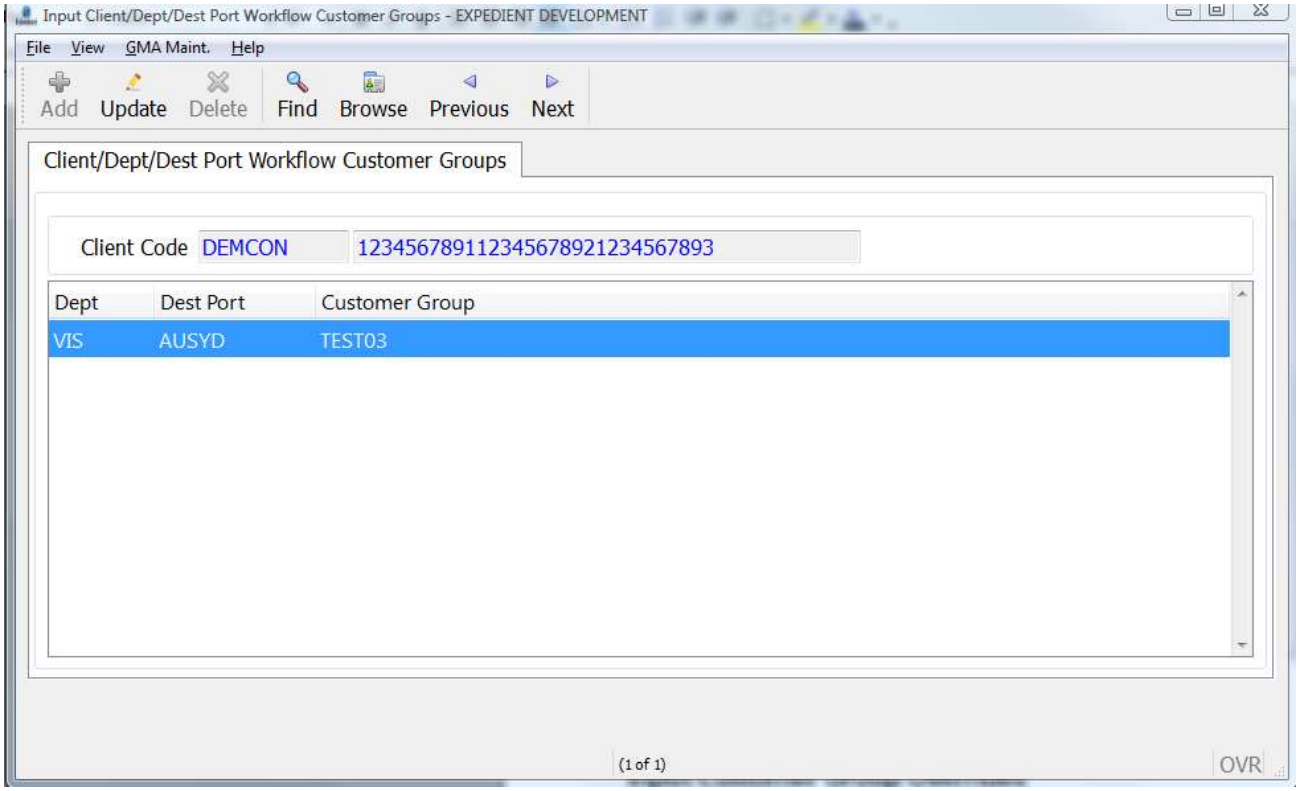


Field Name	Description	Validation	Default
User	Enter or select a valid user	Mandatory	Blank
Work Group	A free text name for this work group or team. This can be up to a maximum of 20 characters in length.	Mandatory	Blank
Branch	Enter or select a branch from the zoom list.	Display Only	Blank
Dept	Enter or select a department from the zoom list. When not entered, all departments within the branch will be included in the user workflow search.	Display Only	Blank
Mode Type	Select Sea Freight or Air Freight from the drop down list.	Display Only	Blank
Active	You can set a group up as inactive until you are ready to enable it.	Display Only	Blank

Field Name	Description	Validation	Default
Customer Group	Enter a customer group. This will limit the workflow for this workflow group to customers with the same Customer Group in the Customer Master File Configuration tab.	Display Only	Blank
View Level	Select "All" or "General Group". This field is only required where the Customer Group is blank. 3. **All** – If you are a user in this team then you will see all jobs that match the other criteria for this group *including* customers that are classified into a particular customer group. 4. **General Group** - – If you are a user in this team then you will see all jobs that match the other criteria for this group *excluding* customers that are classified into a particular customer group.	Display Only	Blank
Role	Enter or select a valid user role	Mandatory	Blank
Cherry Pick	When this is set to YES, the user can elect to work on any job in their workflow. When this is set to NO, the user must work on the jobs in their workflow in ETA order.	Mandatory	Blank

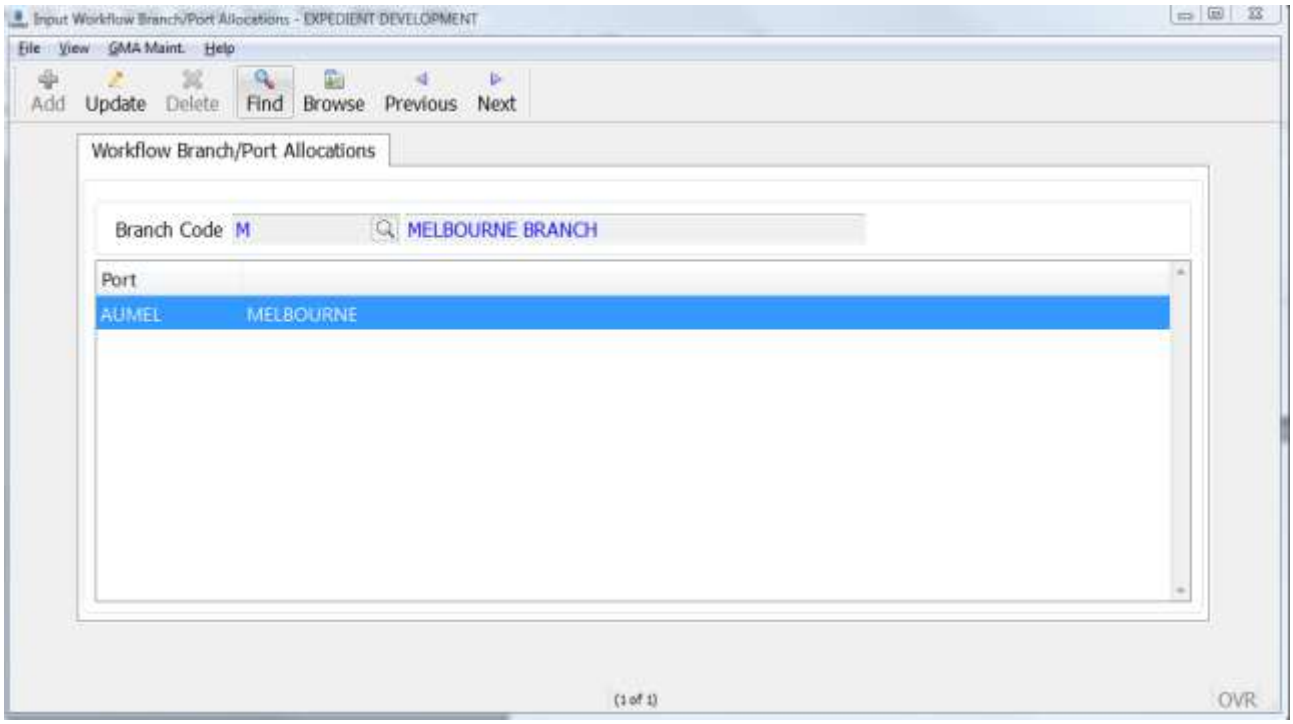
Input Customer Group Overrides

In the Customer Master file screen we had the ability to add a customer group against the customer. Sometimes a further level of override is required on the customer group. This allows a customer's jobs to be redirected to a specific workflow based on customer group, department and destination port.


Input Client/Dept/Dest Port Workflow Customer Groups - EXPEDIENT DEVELOPMENT
File View GMA Maint. Help
Add Update Delete Find Browse Previous Next
Client/Dept/Dest Port Workflow Customer Groups
Client Code DEMCON 12345678911234567892123456789 3
Dept Dest Port Customer Group
VIS AUSYD TEST03
(1 of 1)
OVR

Field Name	Description	Validation	Default
Client Code	Enter a valid customer code or wildcard when using the Find toolbar option.	Mandatory	Blank
Dept	Enter or select a valid department.	Mandatory	Blank
Dest Port	Enter or select a valid destination port.	Mandatory	Blank
Customer Group	Enter a free text customer group name	Mandatory	Blank

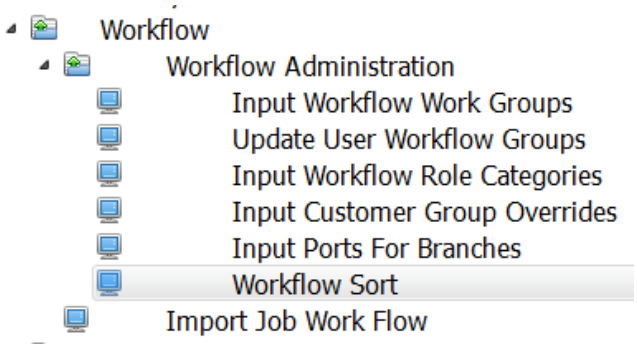
Input Ports For Branches



Field Name	Description	Validation	Default
Branch Code	Enter or select a valid branch code when using the Find toolbar option.	Mandatory	Blank
Port	Enter of select a valid port code.	Mandatory	Blank

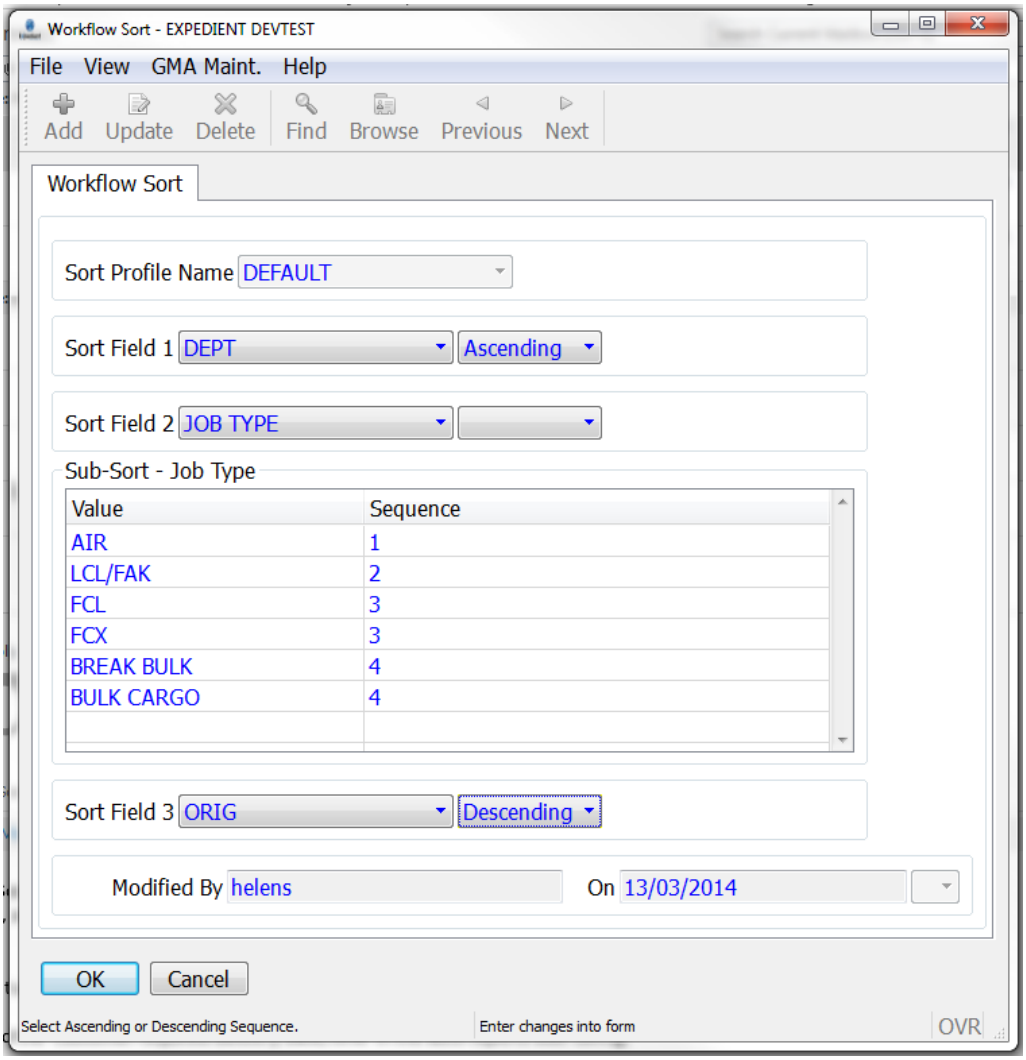
Workflow Sort

The screen provides the ability to set the order for the jobs listed in the workflow screen.



The first, second and third level sorts can be set.

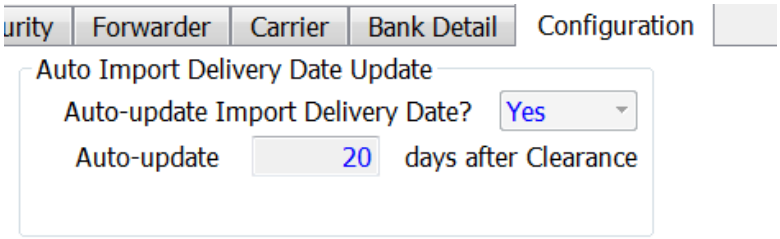
If Job Type is selected as a sort order an additional table will appear allowing the Job Types to be sorted as a sub set, e.g. Air Jobs can be shown above FCL jobs to encourage users to deal with these more urgently.



Field Name	Description	Validation	Default
Sort Profile Name	This is the name of the sort profile. Select a profile from the pull down list	Mandatory	DEFAULT
Sort Field 1	Select the type of information for the first level sort of the jobs and select whether the information is sorted in ascending or descending order	Optional	Blank
Sort Field 2	Select the type of information for the second level sort of the jobs and select whether the information is sorted in ascending or descending order	Optional	Blank
Sort Field 3	Select the type of information for the third level sort of the jobs and select whether the information is sorted in ascending or descending order	Optional	Blank
Sub-Sort – Job Type	Where Job Type is selected as a Sort Field the Sub-Sort table will appear. Select a sort order with the list of job types	Mandatory	Blank

Field Name	Description	Validation	Default
Modified By	This is the user than last updated the Sort Profile	N/A	System Generated
On	This is the date the Sort Profile was last updated	N/A	System Generated

Processes

Process	Description	Run Via
Auto-Update Date Of Delivery	The "DOD" (Date of Delivery) Event and Milestone will be completed when: 1. An actual delivery date is entered when a delivery document is printed. 2. An actual delivery date is entered in the "Various Information" tab. 3. When the "Auto Import Delivery Date Update" process runs if it has been enabled in the Customer Master File Configuration tab.  For Customs Sites: When Auto-update days have elapsed after Clearance, the delivery date on the job is set to the Clearance date for jobs not yet delivered for this customer. For Non-Customs Sites: When Auto-update days have elapsed after ETA, the delivery date on the job is set to the ETA date for jobs not yet delivered for this customer. This is generally used for customers for whom you do not do deliveries.	Cron

Process	Description	Run Via
Archive Milestones	Milestones should be regularly archived. This process moves job milestones into an archive table. Once they have been moved, they can still be viewed using all “Milestone” options but cannot be edited. Only completed jobs will have their milestones archived. Job Milestones will be archived a selected number of days after the job is completed (ie after all milestones are completed). The number of days is configurable on a site by site basis.	Cron
Auto-Complete Jobs	A job does not move to “Job Completed” status until all the milestones are completed or marked as N/A. This process allows all uncompleted job milestones to be completed a selected number of days after a selected milestone has been completed. For instance, 10 days after the delivery milestone has been completed. The number of days and the selected milestone is configurable on a site by site basis.	Cron

Reporting

Import/Export Job Enquiry

Please refer to the Query Module User Manual

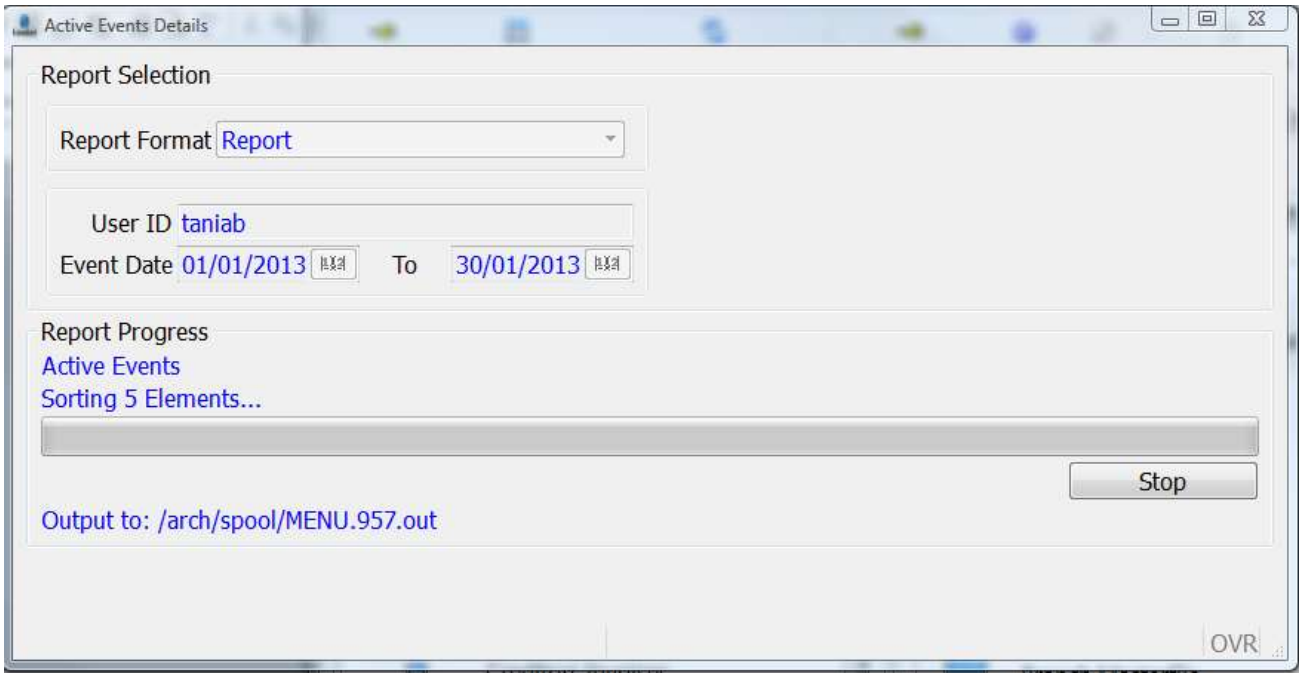
Import Job Exceptions CSV

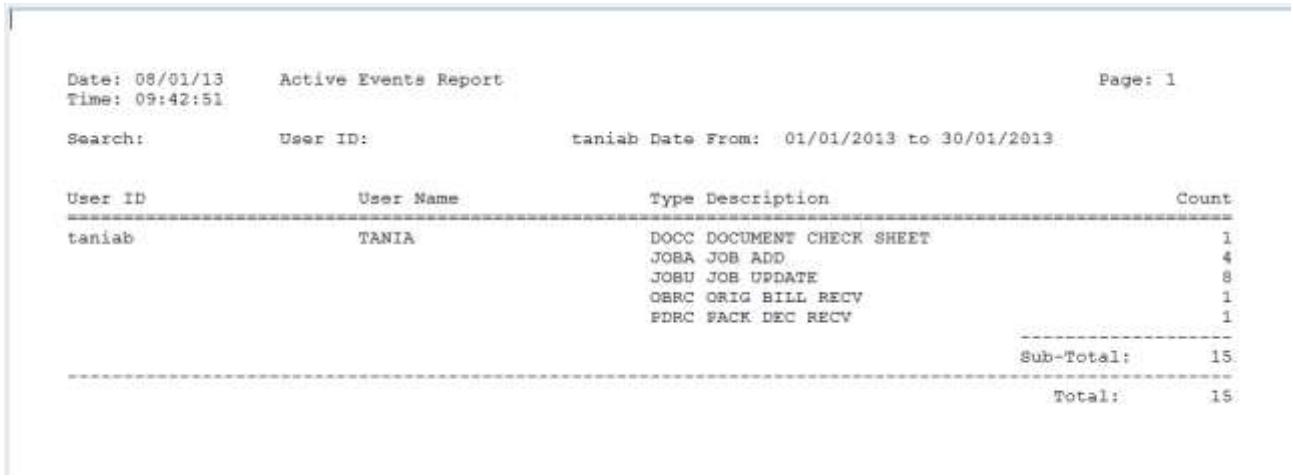
Please refer to the Query Module User Manual

Active Events By User Report

This report will display a count of events performed by user for a specific date range.

This can be run as a standard report or as a CSV file and can be an autoreport.





```
Date: 08/01/13      Active Events Report                                    Page: 1
Time: 09:42:51

Search:             User ID:                 taniab Date From:  01/01/2013 to 30/01/2013

User ID                   User Name                 Type Description                                Count
=============================================================================================================
taniab                    TANIA                     DOCC DOCUMENT CHECK SHEET                           1
                                                    JOBA JOB ADD                                        4
                                                    JOBU JOB UPDATE                                     8
                                                    OBRC ORIG BILL RECV                                 1
                                                    PDRC PACK DEC RECV                                  1
                                                                                      ------------------
                                                                                Sub-Total:             15
-------------------------------------------------------------------------------------------------------------
                                                                                      Total:             15
```